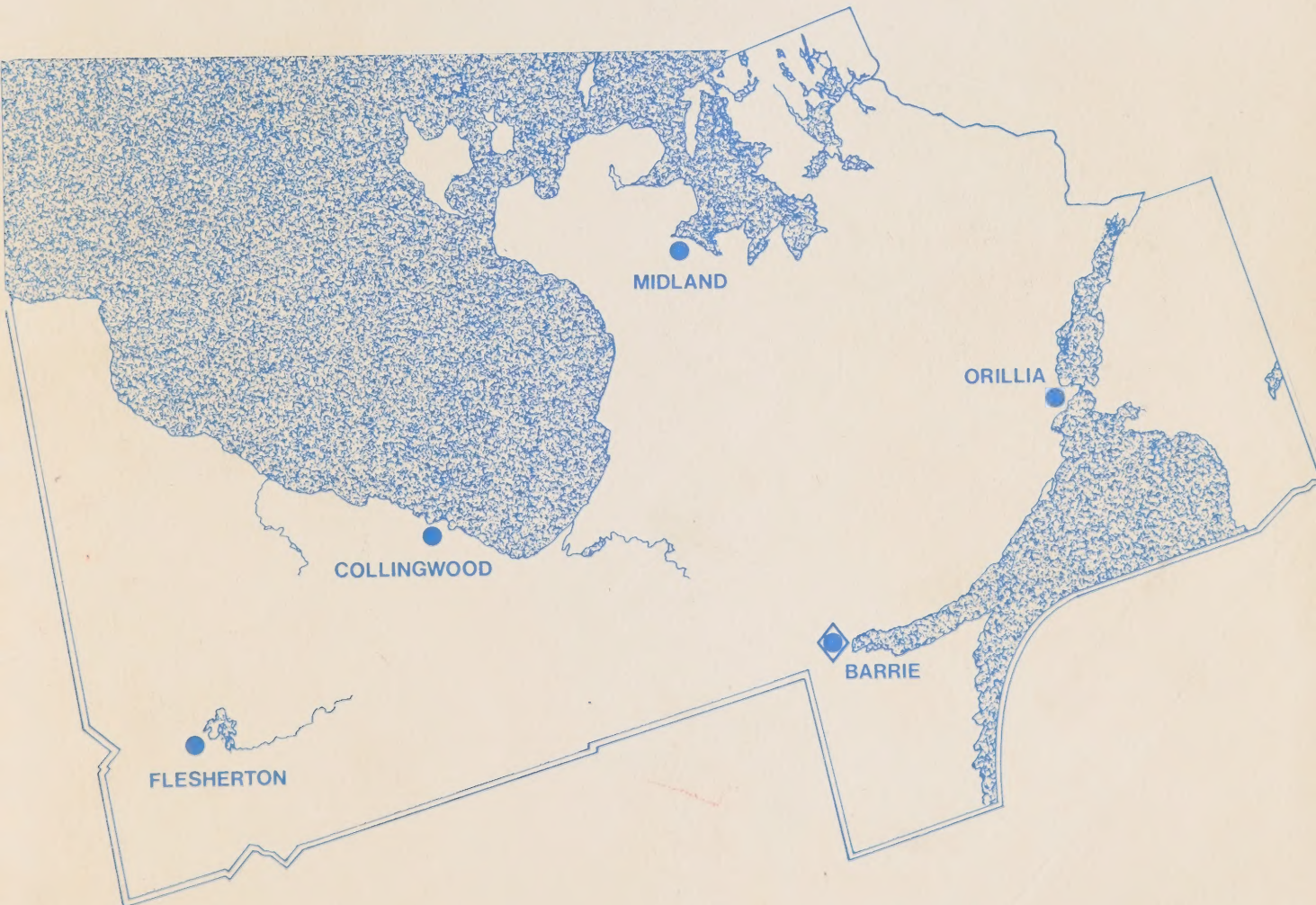


CA24N
IT
-80T52



3 1761 11653260 7

Tourism Development Strategy



Marshall Macklin Monaghan
Thorne, Stevenson & Kellogg

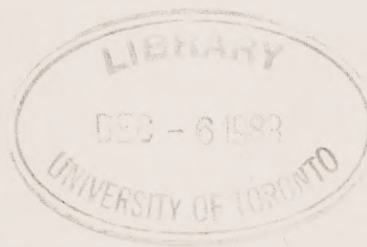


Digitized by the Internet Archive
in 2023 with funding from
University of Toronto

<https://archive.org/details/31761116532607>

CA24N
IT
-80752

TOURISM DEVELOPMENT STRATEGY
COLLINGWOOD-MIDLAND-ORILLIA ZONE
VOLUME I



Prepared for:
Ontario Ministry of Industry and Tourism

Prepared by:
Marshall Macklin Monaghan Limited
Thorne Stevenson & Kellogg

May 1980

Acknowledgements

ACKNOWLEDGEMENTS

The Consultants gratefully acknowledge the cooperation and assistance received from the many government and private organizations during the preparation of this report.

Special mention is due to the Ministry of Industry and Tourism, and the Ministry of Natural Resources and their departments; the Ministry of Culture and Recreation, the Ministry of Transportation and Communications, and the Ministry of Food and Agriculture. The Grey-Bruce Tourist Council and Huronia Tourist Association also offered significant assistance and co-operation to the Consultants.

Public agencies which contributed to the study include the Canada-Ontario Rideau-Trent-Severn (CORTS), The Niagara Escarpment Commission, Ontario Hydro, Ontario Economic Council, Statistics Canada, Parks Canada, and Conservation Authorities.

Co-operation and assistance were extended to the Consultant from Regional and Local organizations and representatives. The Simcoe and Grey County Officials were, in particular, helpful, as were those Associations, Chambers of Commerce, Developers and individuals who contributed at public forums and interviews. The C.N. and C.P. and Oil companies should be acknowledged for their advice on specific concerns.

The conclusions and recommendations within the report are the Consultants' responsibility and do not necessarily reflect the opinions of either those who assisted during the course of the study or the Ontario Ministry of Industry and Tourism.

TABLE OF CONTENTS

	<u>Page</u>
ACKNOWLEDGEMENTS	
EXECUTIVE SUMMARY	(i)
1.0 INTRODUCTION	1
1.1 Foreword	1
1.2 Study Objectives	2
1.3 Organization of the Report	3
2.0 RESOURCE ANALYSIS AND IMPLICATIONS FOR TOURISM DEVELOPMENT	4
2.1 Introduction	4
2.2 Regional Context	4
2.2.1 Delineation of the Study Zone	4
2.2.2 Regional Context	5
2.3 Resource Analysis Summary	6
2.3.1 Approach to Resource Analysis	6
2.3.2 Resource Analysis Summary	8
2.4 Implications for Tourism Development	18
2.4.1 Natural and Outdoor Recreational Resources	18
2.4.2 Historical and Archaeological Resources	19
2.4.3 Human (Cultural) Resources	19
2.4.4 Physical Resources	20
3.0 MARKET ANALYSIS AND IMPLICATIONS FOR TOURISM DEVELOPMENT	22
3.1 Introduction	22
3.1.2 Definitions	22

TABLE OF CONTENTS CONTINUED

	<u>Page</u>
3.2 Market Segments	23
3.2.1 Ontario Residents	23
3.2.2 Metro Toronto Residents	25
3.2.3 Other Canadians	25
3.2.4 U. S. Residents	26
3.2.5 International Visitors	26
3.3 Traveller Profiles and Trip Characteristics	27
3.3.1 Ontario Residents	27
3.3.2 Metro Toronto Residents	32
3.3.3 Other Canadians	32
3.3.4 U.S. Residents	33
3.4 Activity Preferences and Specialty Markets	34
3.4.1 Activity Preferences	34
3.4.2 Specialty Markets	35
3.5 Implications for Tourism Development	41
4.0 SOCIETAL AND LEISURE TRENDS AND THEIR IMPLICATIONS FOR TOURISM DEVELOPMENT	43
4.1 Values and Lifestyles	43
4.2 Demographic Trends and Economic Prospects	44
4.3 Energy Cost	46
4.4 Implications for Tourism Development	47
5.0 JURISDICTIONS AND DEVELOPMENT CONTROLS AND IMPLICATIONS FOR TOURISM DEVELOPMENT	49
5.1 Administrative Jurisdictions and Responsibilities	49
5.1.1 CORTS	50
5.1.2 Niagara Escarpment Commission	51

TABLE OF CONTENTS CONTINUED

	<u>Page</u>
5.2 Government Policies and Programs	53
5.2.1 Design for Development: The Toronto Centred Region	53
5.2.2 COLUC	54
5.2.3 Simcoe-Georgian Bay Area Development Strategy	55
5.2.4 Other Policies and Guidelines	57
5.3 Land Development Process	59
5.4 Implications for Tourism Development	59
6.0 TOURISM INDUSTRY GOALS, OBJECTIVES AND CONCERNS	61
6.1 Organization of the Industry Involvement Process	61
6.2 Tourism Industry Goals, Objectives and Concerns	62
6.3 Assessment of the Tourism Industry and Implications for Tourism Development	65
7.0 ELEMENTS IN THE PREPARATION OF A TOURISM DEVELOPMENT STRATEGY	68
7.1 Introduction	68
7.2 Tourism Development Regions based upon Resource Capability, Industry Expectations and Market Potential	68
7.3 Definition of a Tourism Development Strategy	71
7.4 Framework for the Preparation of a Tourism Development Strategy	71
7.4.1 Planning Approach	71
7.4.2 Guidelines and Principles	72
7.4.3 Tourism and Tourism Development Definitions	77

TABLE OF CONTENTS CONTINUED

	<u>Page</u>
7.5 Alternative Tourism Development Strategies for the Zone	84
7.5.1 Description of Alternative Zone Strategies	85
7.5.2 Evaluation of Alternative Zone Strategies	88
8.0 TOURISM DEVELOPMENT STRATEGY	91
8.1 Introduction	91
8.2 Tourism Development Strategy	91
8.3 Definition of the Tourism Development Areas	93
8.3.1 Area 1 Honey Harbour Outdoor Recreation Area	96
8.3.2 Area 2 Midland-Penetanguishene Tourism Destination Area	102
8.3.3 Area 3 Severn River Historic/Recreational Waterway	119
8.3.4 Area 4 Orillia-Lake Couchiching Outdoor Recreation Area	124
8.3.5 Area 5 Tiny Shoreline Outdoor Recreation Area	127
8.3.6 Area 6 Wasaga Beach Tourism Destination Area	129
8.3.7 Area 7 Blue Mountain Four Season Tourism Destination Area	134
8.3.8 Area 8 Thornbury: A Theme Village	143
8.3.9 Area 9 Beaver Valley Tourism Destination Area	147
8.3.10 Area 10 Horseshoe Valley Outdoor Recreation Area	152
8.3.11 Area 11 Historic Steam Train Tourist Attraction	155
8.4 Tourism and Recreation Service Centres	162
8.4.1 Provincial Service Centre: Barrie	162
8.4.2 Regional Service Centres: Orillia, Midland, Collingwood and Flesherton	164
8.4.3 Local Service Centres	166

TABLE OF CONTENTS CONTINUED

	<u>Page</u>
8.5 Trail Systems and Travel Corridors	167
8.5.1 Trail Systems	167
8.5.2 Travel Corridors	170
8.6 Conclusions and Recommendations	172
8.6.1 General Considerations and Caveats	172
8.6.2 Management of the Tourism Industry System	173
8.6.3 Marketing and Markets	180
8.6.4 Private and Public Sector Roles and Responsibilities	183
APPENDIX: VOLUME 2: TECHNICAL APPENDIX	

LIST OF FIGURES

<u>Figure</u>	<u>Page/Following Page</u>
1. Landscape Unit Evaluation Matrix	7
2. Summary of Tourism Recreational Resources	8
3. Land Development Process	58
4. Recreational Opportunities/Market Associations for Honey Harbour, Midland-Penetanguishene and Tiny Shoreline Regions	70
5. Recreational Opportunities/Market Associations for Wasaga Beach, Collingwood-Blue Mountain and Blue Mountain Regions	70
6. Recreational Opportunities/Market Associations for Meaford-Thornbury-Blue Mountain, Beaver Valley Regions and Barrie	70
7. Recreational Opportunities/Market Associations for West Lake Simcoe Shoreline Region, Orillia, and Lake Couchiching Region	70
8. Recreational Opportunities/Market Associations for Severn River/Canal, Horseshoe Valley and East Lake Simcoe Shoreline Regions	70
9. Framework for Preparation of Tourism Development Strategy and Area Development Strategies	71
10. Comparison of Alternative Tourism Development Strategies	85
11. Evaluation of Alternative Proposed Strategies Against Tourism Development Regions	90
12. Tourism Development Areas and Associated Development Strategies	95
13. Area Development Strategy for Honey Harbour Outdoor Recreation Area	97
14. Area Development Strategy for Midland-Penetanguishene Tourism Destination Area	102

LIST OF FIGURES CONTINUED

<u>Figure</u>		<u>Page/Following Page</u>
15.	Area Development Strategy for Severn River Historical/ Recreational Waterway, Orillia-Lake Couchiching, and Tiny Shoreline Outdoor Recreation Areas	119
16.	Area Development Strategy for Wasaga Beach Tourism Destination Area	129
17.	Area Development Strategy for Blue Mountain Four Season Tourism Destination Area	134
18.	Area Development Strategy for Thornbury Theme Village	144
19.	Area Development Strategy for Beaver Valley Tourism Destination Area, and Horseshoe Valley Outdoor Recreation Area	147
20.	Area Development Strategy for Collingwood to Meaford Steam Train Tourist Attraction	155

LIST OF TABLES

<u>Table</u>		<u>Page</u>
1.	Commercial Accommodation in Study Area	14
2.	Market Forecast - Person Trips (000) to Study Area	24
3.	Traveller Characteristics	28
4.	Trip Characteristics	30

LIST OF DRAWINGS

<u>Drawing</u>	<u>Page/Following Page</u>
1. Regional Context and Intervening Opportunities	5
2. Physiographic Landscape Units	7
3. Tourism Development Regions (Locally Perceived)	69
4. Area Development Strategies	94
5A. Midland Waterfront Development Concept	103
5B. Penetanguishene Development Concept	103
6. Wasaga Beach Tourism Destination Area Development Concept	129
7. Blue Mountain Four Season Tourism Destination Area Development Concept	134
8. Thornbury Theme Village Development Concept	144
9. Beaver Valley Destination Area Development Concept	147
10. Historic Steam Train Tourist Attraction Development Concept	155
11. Linear Route Systems	169

Executive Summary

EXECUTIVE SUMMARY

The Ontario Ministry of Industry and Tourism commissioned Marshall Macklin Monaghan Limited in September 1979, to prepare a tourism development strategy for the Collingwood-Midland-Orillia area, one of the 17 Tourism Development Zones as defined by a previous study, Tourism Development in Ontario: A Framework for Opportunity (1976).

This study is not intended to be a government policy document. The purpose of the report is to develop a coherent framework for the tourism industry through the establishment of a development strategy and the identification of complementary development opportunities that meet market expectations and that can be acted upon by the public and private sector. This report is, therefore, a strategy planning document at the zone or secondary level; the primary level being the provincial framework. Before the implementation of a major development proposal, tertiary level or master planning documents and financial feasibility studies are required.

It must be recognized that the zone has a limited carrying capacity for further tourism development due to the competition for resource opportunities between local residents, second home owners and the more traditional tourist. This document presents development opportunities from an integrated resource management perspective that can be phased to reflect the carrying capacity and hopefully will maintain an acceptable socio-economic balance for the industry.

Tourism expenditures in the Province of Ontario in 1979 were \$6,642 million and total derived income was estimated at \$12,487 million. Within the study area, tourism expenditures in 1979 totalled \$263 million and total income derived from tourism was estimated at \$308 million. Under present programs this tourism income is expected to grow to \$519 million by 1984.

The Collingwood-Midland-Orillia Zone attracted between 5.7 million and 6.4 million person trips in 1979. Visitors to the area should grow at an average rate of two per cent per year to reach between 6.3 million and seven million person trips in 1984.

Ninety-seven per cent of visitors to the study area are residents of Ontario, and 49 per cent of these visitors live in Metro Toronto. Visitors from the United States, as a percentage of total person trips, have declined in recent years by 2.2 per cent per year and it is expected that this trend will continue. The greatest rate of growth in visitation will occur from international visitors (excluding the U.S.), although the absolute number of person trips - between 17,000 and 26,000 in 1979 - is very small. However, expenditure by this market is significant.

The Ontario visitor to the area tends to be older and more affluent than the average Ontario tourist who visits his/her own province, travels to the zone by car and uses a private dwelling for accommodation.

Specialty markets are becoming increasingly more important to the tourism industry. The major specialty markets for the study area are water-based activities in the summer, in particular, recreational and tour-boating, and both downhill and cross-country skiing in the winter.

To develop a comprehensive strategy for the zone, it was first necessary to take an inventory of resources (natural, historical, cultural, recreational, events, attractions and existing facilities and services) for each of 41 landscape units in the Study Area. The data base was extended to include demographic profiles and trip characteristics of major markets and socio-economic trends which affect tourism, the jurisdictional controls of development, and finally, the tourism industry's goals, concerns and perceptions. The information was analysed for its implications in developing a tourism strategy.

The primary conclusion of the evaluation process was that the Collingwood-Midland-Orillia Tourism Zone is neither homogeneous nor integrated. Natural or physical factors aside, the industry generally presents an un-coordinated and fragmented product of varying levels of quality, oriented towards market conditions of the 1950's and 1960's. Competitiveness within the Zone is detrimental to the industry realizing its full potential, especially if the Zone is to respond creatively to the anticipated market demands of the 1980's and 1990's.

At present, the lack of sufficient leadership, the existing approach to the development and promotion of the tourism industry, the competition for quality tourism and recreation resources, all combined with an impressive array of jurisdictional controls at all levels of government, serve to retard the growth of the Zone's tourism industry.

To balance this somewhat critical view, the zone offers a great diversity of recreational facilities which support some of the best recreational opportunities in Ontario. The zone is close to its major market and the demand for diverse leisure-time and vacation facilities is growing and expected to continue to expand but at a reduced rate.

The Tourism Development Strategy took the above conclusions as important considerations in devising guidelines and principles for the Zone.

One principal guideline in developing a Zone-wide strategy is that the health of the whole Zone takes precedence over specific local demands. Hence, the conceptual approach is to view tourism as a system with an integrated hierarchical structure.

Five alternative strategies with varying emphasis on length of vacation, private and public sector responsibilities, type of attraction and facilities, and degree of integration were produced and evaluated against development regions.

The appropriateness of these strategies was tested against three groups of data - existing conditions and land use, the region's expectation of development and market attraction, and the actual resources and market potential.

The diversity of resources and expectation among the regions precludes the selection of a single zone-wide strategy. Therefore, the decision was to adopt a flexible multi-directional approach which permits the application of any one of the five initial strategies to any area within the Zone. To ensure a co-ordinated systems approach to the growth and development of the tourism industry as a whole, the selection and application of any alternative strategy must conform to the Zone-wide planning principles.

The Tourism Development Strategy for the Collingwood-Midland-Orillia Tourism Development Zone is:

To recognize the diversity of the Zone's resource characteristics and development potential; the variations in the goals and objectives of different sectors of the tourism industry; the wide range of lifestyles and expectations of the Zone's residents; private sector development proposals; and future tourism and leisure trends through the application of different tourism development strategies on a nodal and corridor basis throughout the Zone.

Specific, complementary, area development strategies were then produced and applied to the following eleven areas that exhibited significant tourism resource and development potential.

- Area 1. Honey Harbour Outdoor Recreation Area
- Area 2. Midland-Penetanguishene Tourism Destination Area
- Area 3. Severn River Historic/Recreational Waterway
- Area 4. Orillia-Lake Couchiching Outdoor Recreation Area
- Area 5. Tiny Shoreline Outdoor Recreation Area
- Area 6. Wasaga Beach Tourism Destination Area
- Area 7. Blue Mountain Four Season Tourism Destination Area
- Area 8. Thornbury: A Theme Village
- Area 9. Beaver Valley Tourism Destination Area
- Area 10. Horseshoe Valley Outdoor Recreation Area
- Area 11. Historic Steam Train Tourist Attraction

In addition to the strategies, the development intent and opportunities for investment were identified for each area. It was assumed that preservation of natural, historical and cultural resources was paramount, that the level of development should be commensurate with the objectives and aspirations of local residents, and that local government has an important place in the planning and development process.

The following is a summary of the Tourism Development Strategy for the Collingwood-Midland-Orillia Tourism Development Zone and the associated development opportunities.

Honey Harbour Outdoor Recreation Area

The Honey Harbour Area is characterized by a myriad of islands, boat passages, lakes and rivers and is ideally suited for a variety of extensive forms of water-oriented recreation. Therefore, the development intent for the Honey Harbour Outdoor Recreation Area is to complement and accentuate the provision of land-based attractions, recreational developments and support facilities for short and extended commercial and private pleasure cruises and other water-oriented recreational activity of a commercial nature.

With careful route appraisal and selection, the commercial and private pleasure cruises throughout the 30,000 island area would provide benefits and support to a wide range of commercial establishments, not only to those located in Honey Harbour, Port Severn and Midland but also to those in more remote locations.

Midland-Penetanguishene Tourism Destination Area

This area is designated as the major destination centre for the northern part of the zone. The basic development intent is to create unique, innovative commercial attractions and facilities that will serve as major travel generators focused around two basic

themes; i) water and water-associated activities and ii) the history of the area. These attractions are to be integrated with existing complementary development and should create the volume of tourist traffic necessary to support the upgrading of the accommodation plant.

The major components are briefly described below and all have strong elements of active as well as passive visitor participation.

Midland:

Tour Boat Centre: All boat tours should operate from this centre; the reservation system should allow visitors to make reservations for any scheduled trip to various destinations, arrange Great Lake Charters and book water-associated accommodation to complement appropriate tour packages. The Centre should have the capacity to serve 150,000 visitors or Tour Boat users per year.

Accommodation/Commercial Complex: East of the government docks near the Boat Tour Centre and directly on the waterfront, the proposal is for an innovative 80 to 100 unit complex to be built on the strength of the tour boat market and to reflect a water-based theme.

Entertainment Complex: Here the silos should be remodelled to house a restaurant at the top with a panoramic view of the harbour and 30,000 Islands, a cocktail lounge for entertainment and dancing, a commercial shopping arcade, a theatre in the round to show 360° films, and a theatre in the round for stage events.

The Aquarama: Moored alongside the Entertainment Complex should be a freighter to contain "aquatic communities" from both indigenous and more exotic habitats. Visitors may simply view the communities, or investigate with snorkel gear or bathyspheres. The Aquarama should accommodate between 200,000 and 300,000 people per year.

Marina: The proposed marina should provide all facilities and services for the seasonal and transient boating public, containing at least 600 slips when fully developed. Efforts should be made to have boating-related industries and crafts locate close to the area. With guides to explain the skills and craftsmanship, the industries become an attraction in themselves.

Waterfront Park: Designed to support the maritime atmosphere, its primary purpose is to provide a place for unstructured activities for both residents and visitors.

As the Waterfront Development Plan is implemented, a condominium hotel could be built when market warrants, and commercial establishments with some relation to the tourism industry should be encouraged to develop facilities along the waterfront.

The development, activities and programs proposed for the Waterfront area will complement the attractions and commemorative programs at Ste. Marie among the Hurons, the Martyrs' Shrine and the Wye Marsh. The complementarity can be reinforced by integrating these attractions through boat-tours and boardwalks.

Penetanguishene:

The intent is to create a year-round cultural centre which highlights the distinctive Francophone culture and heritage of the area, focussed around a heritage harbour commemorating the era of the 'Tall Ships' in Ontario maritime history.

Heritage Harbour: The proposal is to create a living museum with a total theme treatment of the era when the 'tall ships' sailed the Great Lakes. Replicas of these important vessels should take passengers through Georgian Bay and visitors may witness historic naval battles.

The on-shore architecture and landscape should set the scene for Heritage Harbour. Architectural resources in Penetanguishene should be preserved and, where possible, restored. By emphasizing the French-Canadian ambience in food, music and other social activities, an historical and lively background should produce an atmosphere conducive to the enjoyment of scheduled cultural events. Once the facilities are developed, the attractions and events of Penetanguishene should be integrated into regional and zone-wide promotion.

Major events that combine and promote the facilities and attractions of Midland-Penetanguishene Area are proposed to emphasise the market identity of the area.

Severn River Historic/Recreational Waterway

The development intent is primarily to provide additional recreational facilities, services and attractions for boaters, and to develop a package boat/autobus/auto tour for non-boaters to enjoy the Severn Waterway.

The development opportunities lie in upgrading accommodation facilities, marinas and marina services, and taking advantage of archaeological and historic sites as well as the natural attractions. Co-operation between private entrepreneurs operating the required facilities and government agencies which control the locks and marine-railways along the Severn system is essential.

Facilities developed for summer boat traffic can also be used in winter for skating/snowshoe marathons, or snowmobiling rallies which connect Port Severn with Orillia along established trails.

Orillia -Lake Couchiching Outdoor Recreation Area

To respect the balance in existing uses for the area, the basic development intent is to support the growth of well-designed cottage subdivisions near the shore and encourage the development

of the shoreline-zone for public access and day-use activities. Marina facilities should be concentrated in the urban areas of Orillia and Washago.

In considering the development opportunities for second-home/cottages, it is suggested that serious attention be given to the possibility of a condominium trailer park in the Orillia-Lake Couchiching area which would be appropriate for retired people. The park could be operated on a time-shared basis and twinned with similar developments in the "sun belt" states. Such arrangements respond to the desire of many retired people to spend summer and fall in Canada, and winter and spring in southern states.

Lake Couchiching offers many advantages for sailing. Support facilities and slips for 150 sailing crafts are recommended to be located in the Orillia Yacht Basin designed to serve Lakes Simcoe and Couchiching.

Tiny Shoreline Outdoor Recreation Area

This area has the advantages of offering both water-oriented and extensive land-based recreation activities. The development intent is to support the Secondary Plans established by Tiny Township and local municipalities in which shoreline land units are to be developed as day-use facilities for the public. Further recommendations are to encourage the development of cottages in selected locations and to stimulate the growth of such activities as horseback riding, hiking and cross-country skiing.

Development opportunities for the private sector are related to the development of the cottage areas and the provision of services for visitors to the public facilities.

Wasaga Beach Tourism Destination Area

Primarily an area which draws visitors for the day or weekend within a radius of 100 to 150 km, the development intent is to accentuate the existing use pattern and to maintain and expand the market of current visitors, and to upgrade the variety and quality of amusement and recreational facilities. This development program is based upon a community zoning plan that outlines not what exists at the present time, but describes the desirable characteristics, location and association of the residential, commercial, industrial, institutional, amusement and other zones forming the basic structure of the community.

The major development opportunity lies in the proposed creation of a 100 acre Amusement Park to concentrate a wide diversity of daytime amusement facilities which are family oriented and of high quality. The choice of a theme is highly recommended to guide design and selection of major entertainment and special attractions.

The development concept for the Park includes frontage on the Nottawasaga River and easy access from the beach area proper. A nature reserve for peaceful contrast is to be connected to the Amusement Park by a miniature train and boardwalk, both elevated to minimize effects on the nature reserve.

Upgrading and re-orienting commercial and accommodation facilities towards the range of specialty markets is the key to exploiting the development opportunities in Wasaga Beach.

Blue Mountain Four Season Tourism Destination Area

The development intent for the Blue Mountain is to create a comprehensive Four Season Tourism Destination Area in a rural landscape with a diversity of high quality accommodations and a

sufficient number and variety of tourism and recreation opportunities capable of attracting regional and provincial markets throughout the year. A central resort community at Blue Mountain is the core with rail, road and trail links to other satellite developments.

The characteristics, development intent and opportunities of the composite elements of the area are described briefly.

Georgian Peaks: The emphasis in this development is on day use for a wide variety of both winter and summer tourism and recreational facilities. Water-oriented recreation facilities are to be located across from the Georgian Peaks along the Nottawasaga Bay primarily for second-home residents. There are further possibilities for camping and skiing on the Ontario Hydro lands subject to further investigation.

A second-home residential development of 600 to 700 units, west of Georgian Peaks should be reassessed in the context of the Blue Mountain Four Season Destination Area. If the design and location is compatible, the development should be encouraged together with ski to and ski from access to the Georgian Peaks Development.

Blue Mountain Resort Community: As the centrepiece for the area, the resort community is planned for pedestrian enjoyment and safety. The commercial sector should offer a full range of retail and social services for visitors and residents, and a range of accommodation from hostels to efficiency apartments or chalets; internal time-sharing programs administered by a central lodge should also be available. The central area should have facilities capable of handling up to 1,000 people for groups and associations, conventions and association displays.

To diversify sport and recreational opportunities, there should be a sports complex for such sports as tennis and racquet ball, skating, hockey and curling.

The high-quality ski facilities should be complemented by other winter recreational attractions. Summer programs should be augmented with the availability of racquet sports, swimming pool, land extensive activities, and for the really keen sportsman, professional instruction in his chosen avocation. A trail centre on the Niagara Escarpment should co-ordinate the summer and winter trail activities.

A residential development of between 1,500 and 2,000 units is proposed for construction around the commercial/recreational core, including both private homes and time-shared accommodation.

Championship Golf Course: The proposal is for an 18-hole golf course, designed for competition play, so that it can be promoted for major golfing events or tournaments. The design of the surrounding rural estate residential developments will be such that they do not have any detrimental affect on the golf course.

Longpoint Residential Development: The primary intent is to satisfy the market for second-homes with modest to fairly high-priced dwellings. The proposed development is to stretch from Longpoint Bay past Pigeon Point and should be designed in clusters around ponds and water features. A small park on Longpoint Bay should provide water-oriented recreation facilities and allow the graceful integration of the development with landscape features and the golf course.

It should be noted that optimum development for the Blue Mountain Four Season Destination Area with respect to accommodation is the equivalent of 5,000 to 6,000 beds. A much greater density would degrade the overall quality of the tourism experience, and a much lower density would not fulfill the development intent for the Four Seasons Tourism Destination Area.

Given the complexity of the total project, there are a number of prior conditions to be met if the Area is to reach its potential. There is a fundamental need for a development vehicle which has

the capacity to assess innovative ways for realizing the potential of a Four Season Tourism Destination Area; special consideration can then be given to the applicability of resort community legislation, tourism development organizations and special planning districts, among others. Under this development vehicle, responsibility for guiding the growth and development of the tourism industry in the Area can also be assigned.

Prior to the initiation of major developments, a comprehensive master plan should be prepared, followed by a detailed land use zoning plan which should become part of an Official Secondary Plan. Before any development can be permitted, the installation of full water and sewage services is necessary.

Thornbury Theme Village

The development intent is to focus upon the charm and atmosphere of this small, historical, agricultural village and encourage the development of programs, events and facilities that will commemorate its agricultural and historical roots without serious detriment to the lifestyles of the local residents. The emphasis will be on the development of a small commercial core tied through a pedestrian walkway to the train station, the harbour and the marina, the historic resources of the village and to a landscaped park along the Beaver River. The Village and surrounding agricultural community should be encouraged to establish and promote fairs and festivals celebrating important agricultural events and activities.

Thornbury is linked by walkways, hiking and biking routes, to Kimberly, Flesherton, Meaford, the Blue Mountain Resort Community and the Beaver River Park.

Beaver Valley Tourism Destination Area

The development intent is to strengthen and diversify the existing winter sport facilities and to develop, in the Valley, a well-equipped equestrian park. Kimberly is the focal point for the winter resort area and is a major trail centre for trails to Thornbury and Blue Mountain.

Development proposals for Kimberly as the service centre are on an ascending order of complexity and can be staged to match market demand: i) Complete the existing residential subdivision and examine the feasibility for innovative second-home residences throughout the area, ii) construct a major skiing complex on provincial lands adjacent to Kimberly; construct condominiums and ski chalets in 40 unit packages, iii) expand and upgrade retail services and facilities to keep pace with visitor demand and iv) examine the feasibility of the construction of a central sewage and water plant to service Talisman, Beaver Valley Ski Club, the Village of Kimberly and the new ski complex.

The development intent for Beaver Valley is primarily to build upon the valley's special suitability for equestrian events. The facilities to be developed should include all those that pertain to the care and training of horses for equestrian events and centrally located accommodation and entertainment facilities for members and visitors. There is, in addition, some opportunity for extensive recreational activities and limited residential ranchette development on marginal agricultural lands.

Horseshoe Valley Outdoor Recreation Area

There are a number of ski developments associated with the Horseshoe Valley Area and further opportunities available throughout the Copeland Forest. The development intent is to expand the existing winter sport facilities and diversify recreational opportunities for the summer months. To provide the

area with a built-in market for the diversified development, the expansion of the chalet and condominium complexes is recommended. Internal time-sharing schemes could be introduced into these complexes.

The Horseshoe Valley is designated as a major stopover on the Orillia-Midland-Pentanguishene trail course for the ski-marathon. The intent is to promote the ski marathon as an annual event associated with winter carnivals in the Zone.

Historic Steam Train Tourist Attraction

The development intent is to create a major summer attraction built around the theme of historic steam trains and associated support facilities that will serve as a primary travel generator augmenting the existing winter and summer tourism and recreation use patterns. The proposed attraction is composed of distinct development nodes linked by rail and road. The nodes are the Collingwood Rail Town and Museum, Craigleith Restoration and Repair Depot, Thornbury Station and End-of Track Park in Meaford.

The development nodes, commemorating major aspects of the era of historic steam trains including stations, repair depots and streetscapes, although integrated through theme association are distinct units that can be phased in development and visited independently without loss in quality of experience.

Provincial and Regional Service Centres

In the context of zone-wide tourism development planning, major urban areas have distinctive roles, and are designated as Provincial or Regional Service Centres, depending on the range of services for tourists. The Collingwood-Midland-Orillia Tourism Development Zone has one Provincial (Barrie) and four Regional (Orillia, Midland, Collingwood and Flesherton) centres.

Barrie is the Regional Gateway as well as the Provincial Service Centre for the Zone. The largest urban centre in the zone, Barrie offers a complete range of services to the tourist, appropriate to its designation.

With respect to the waterfront redevelopment plan being proposed for Kempenfelt Bay, Barrie, the tourism strategy recommends the integration of the sports complex, the convention facility and hotel into one facility in a resort 'setting' on the waterfront with access to a full service marina, other boating facilities and related shoreline activities. A strong recommendation is made for a comprehensive waterfront development plan, including market analysis and feasibility studies, to be prepared and incorporated into the overall development plan for Barrie.

The mix of facilities and services of regional service centres differs according to the orientation of the area's tourism industry and may have attractions complementary to opportunities in the area, but each serve to stimulate and co-ordinate the tourism industry of the adjoining area.

Of the designated regional centres, Flesherton is recommended for assistance to upgrade its utility and service systems because of its strategic location with respect to Beaver Valley.

Collingwood's economy is already heavily dependent upon the tourism industry. It is, therefore, recommended that Collingwood explore options of persuading industries to locate in an industrial park in the community, stressing the advantages of locating in a community with high quality recreational and social amenities.

Travel Corridors

Access to the defined Tourism Areas, just as linkages between the areas and their attractions, is a prime requisite for the tourism development strategy. Hence, the network of highways,

railroads and trail systems were assessed. In addition to endorsing the Ministry of Transport's intentions with respect to Regional Travel Corridors in the Zone, Highways 27, 26 and 24 are recommended for further upgrading.

A further recommendation is to investigate the feasibility of a sport train service to be initiated between Metro Toronto and the major Tourism Destination Areas.

Equestrian, hiking, snowmobile and cross-country ski trails are reasonably well developed, especially for day-use. Recommendations are to extend trails for longer distances in specified circumstances, but primarily, what is required is an educational and co-ordination program for all trail users.

The specific objectives for each development area and major attractions have been summarized to indicate the structure and some of the program and physical linkages of the tourism system in the Zone. The implementation of the Development Strategy is as much reliant on a supporting framework for the planning and development of tourism as on specific programs.

Market conditions and trends have changed markedly in recent years and tourism operations should continue to move towards being well co-ordinated, highly professional, flexible and responsive to maintain their viability.

In particular, innovative and diverse attractions/facilities which cater to the growing specialty markets should be created to meet the anticipated demand over the next 15 to 20 years.

The hierarchical structure of the system has received careful attention in the process of developing the tourism strategy and it should be respected to preserve the complementary, as opposed to competitive, relationships established. The structural system ensures that the benefits of major attractions and facilities are

spread directly and indirectly, with spin-off effects, throughout the zone. Visitors drawn to an area for a particular reason come in contact with other attractions/facilities which are alternative and/or complementary rather than duplicative and/or competitive activities. For example, history buffs may be attracted in large numbers to the Historic Steam Train or Heritage Harbour; but those visitors will also be tourists to Collingwood, the Blue Mountain area, Thornbury and Meaford; or Midland's Aquarama and Entertainment Complex. Themes, events, attractions and programs are designed to reinforce the integration of areas as well as stamp a strong, marketable identity on the Zone. Having created the market identity, promotion should be geared to extolling the distinctive facilities and attractions of the development areas, rather than the marketing of accommodation.

Where 'clustering' of developments, or nodal development is recommended, the intent is to give due consideration to social, economic, environmental and resource limits, to respect the integrity of local communities, and confine the impact of tourism development so that natural and environmental resources are conserved.

Ambitious and innovative development proposals can only be realized by joint public and private sector involvement and commitment. All major tourism developments should prepare master plans to be incorporated into official plans and zoning by-law documents.

In summary, this report presents a comprehensive Tourism Development Strategy for the Collingwood-Midland-Orillia Zone that anticipates the requirements of the tourism industry in a dramatically changing situation and is responsive to local, area, and regional concerns.

1

Introduction

1.0 INTRODUCTION

1.1 Foreword

In September 1979, Marshall Macklin Monaghan Limited was retained by the Ministry of Industry and Tourism of the Province of Ontario to undertake the preparation of a Tourism Development Strategy for the Collingwood-Midland-Orillia Tourism Development Zone. This report is the result of an extensive resource analysis carried out to ensure that the recommended strategy is compatible with the natural, historical and cultural resources of the study area, and recognizes the strengths and weaknesses of the existing tourism and recreation infrastructure. It is also the result of a public and private sector involvement program designed to give municipal officials, business interests, local special interest groups and tourism operators opportunities to present and obtain feedback on their concerns, expectations and goals. The Tourism Development Strategy, based on the findings of these investigations and inquiries, as well as an analysis of market potential and economic opportunities, suggests those actions which should be taken by both the public and private sectors in order to realize the greatest benefit to local, regional and provincial populations.

Tourism is defined as the travel, activities and services used by any Ontario resident beyond a 40 km (25 miles) radius from home for the purpose of personal enjoyment. Also, the travel, activities and services used by non-residents who enter the province for any reason other than work. It is recognized that elements of tourism are often involved when people travel for business purposes.

A tourist is defined as any Ontario resident travelling in excess of 40 km (25 miles) from his home for any purpose other than commuting to work and any non-resident who enters Ontario for any purpose other than work.

1.2 Study Objectives

The Ministry of Industry and Tourism objectives for this study were set out in the Terms of Reference. These objectives were:

- a) To examine the tourism/leisure potential of the Collingwood-Midland-Orillia Tourism Development Zone and to detail a strategy whereby that potential may be maximized;
- b) To identify specific tourism development opportunities to guide the activities of the private and public sectors;
- c) To investigate the potential of, and recommend criteria for the designation of four-season tourism destination areas;
- d) To provide useful background information to investors, planners and governments.

The resultant Tourism Development Strategy, therefore, is intended to outline for private sector consideration and financial investment, an integrated system of tourism development opportunities. It is not intended to reflect existing government policy, nor can it be construed as being a policy framework that will reflect future government action. Further, the Strategy will not identify programs and measures for implementing its recommendations as detailed feasibility studies are required before implementing major developments. Although it will recognize the roles and responsibilities of both the public and private sectors in its recommendations outlining development opportunities, the specific measures for implementing the recommendations are to be the subject of discussions and negotiations between the private and public sector. The Strategy, therefore, will be a general, not a detailed blueprint guiding individual action.

1.3 Organization Of The Report

The study results are presented in two volumes. All the basic information describing the characteristics of the resources, the existing tourism and recreation plant, regional infrastructure, zone administrations and present markets is presented in Volume 2: Technical Appendix. The analysis of that information and the resultant Tourism Development Strategy with its associated development opportunities and recommendations can be found in Volume 1: Tourism Development Strategy: Collingwood-Midland-Orillia.

Of necessity, Volume 1 is highly dependent upon Volume 2 for the support and elaboration of its assumptions and conclusions. Where appropriate, cross-references have been made to ensure that the reader can turn to the relevant section in the supporting volume for further information.

2

Resource Analysis and Implications for Tourism Development

2.0 RESOURCE ANALYSIS AND IMPLICATIONS FOR TOURISM DEVELOPMENT

2.1 Introduction

The natural, physical, historical, archaeological and cultural resources occurring throughout the Collingwood-Midland-Orillia Tourism Development Zone are detailed in Chapters 2, 3 and 4 of Volume 2: Technical Appendix. The basic characteristics of these resources and their potential for stimulating the growth of the Zone's tourism industry are summarized below. Special emphasis has been placed throughout this summary upon the identification of factors that must be considered during the preparation of tourism development strategies and associated programs.

This chapter, therefore, contains a description of the study zone and its regional context, an analysis of the existing capability of the resource base to support existing, anticipated or desired tourism activity and a summary of implications for tourism development.

2.2 Regional Context

2.2.1 Delineation of the Study Zone

The Collingwood-Midland-Orillia Zone (Zone No.7) was first defined in a very general way in the report Tourism Development in Ontario: A Framework for Opportunity (1976). No specific boundaries were established except to suggest that Zone No.7 should include the area covered by Meaford in the west to Brechin in the east, and from Honey Harbour in the north to Cookstown in the south.

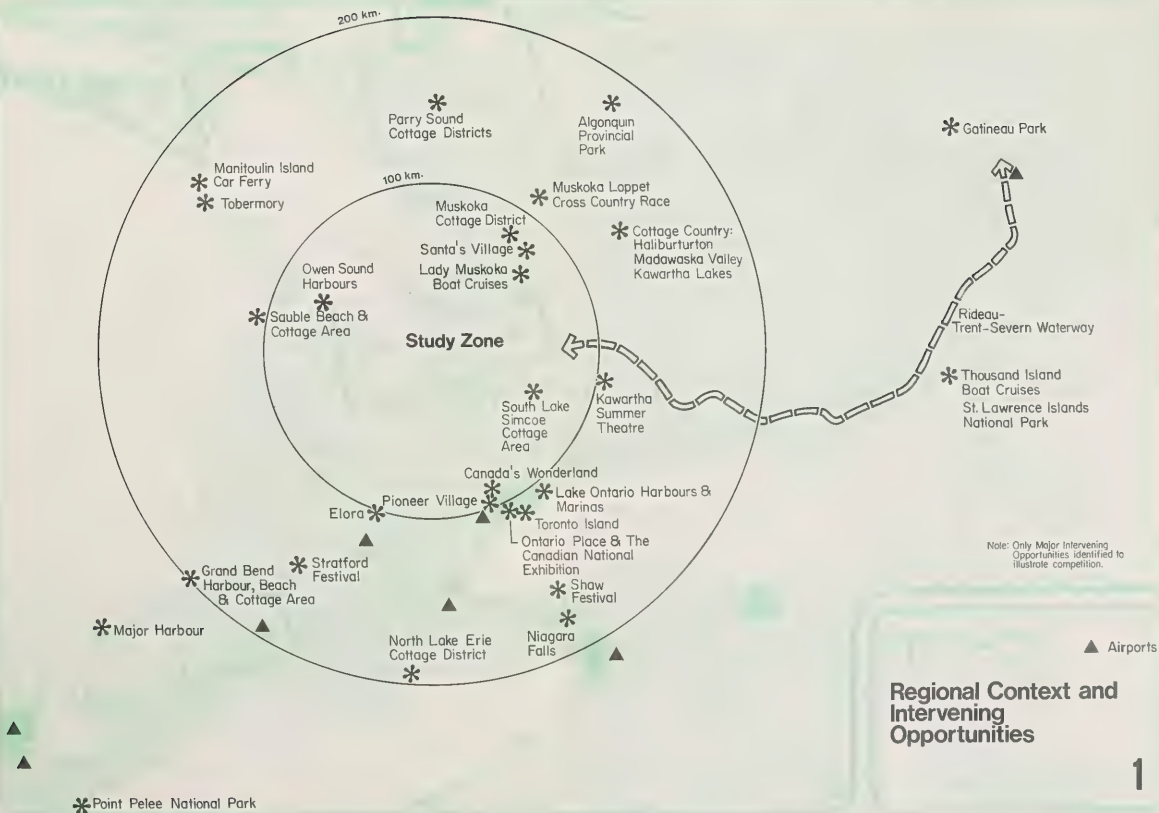
For the purpose of obtaining data on resource characteristics and existing use patterns, these general boundary definitions were translated into the following administrative boundaries (See Drawing 1).

Northwest corner of St. Vincent Township, Grey County, south to the southwest corner of Artemesia Township, Grey County. The village of Markdale is included in the study area. Then, the study area boundary runs east along township lines to the northwest corner of Innisfil Township, Simcoe County. The entire Township of Innisfil is included as well as the Townships of Mara and Rama in Simcoe County. The boundary then runs from the northwest corner of Rama Township, along the Severn River to the southeast corner of the old Baxter Township in the District Municipality of Muskoka. The entire Township of Baxter, as well as the offshore islands, are included in the study area.

The study area so established guided the resource inventory and analysis used to establish the recommendations for the growth and development of the Zone's tourism industry. Because of the need to define specific tourism development opportunities, the above boundaries do not imply that specific tourism recommendations will be made for each and every part of the area circumscribed by these boundaries. As illustrated by Drawing 3, only those areas exhibiting significant potential for contributing to the growth and development of the tourism industry have been so treated. The remainder of the Zone is covered by the more general zone or sector recommendations described in Section 8.6, Conclusions and Recommendations.

2.2.2 Regional Context

Situated along the southern portion of Georgian Bay, the study area is conveniently located in terms of its major markets - Toronto, Kitchener/Waterloo and Guelph, which together provide about 95% of the Zone's annual visitors. All lie within 150 km of any point within the study area, a distance that is not a serious deterrent to people wishing to travel to the Collingwood-Midland-Orillia Zone for weekends or short-term vacations.



Regional Context and Intervening Opportunities

Access is also convenient. A well-developed provincial highway system links the urban centres with the study area. Visitors from Kitchener/Waterloo and Guelph tend to use Highways 10, 24 and 6 while Metro Toronto residents use Highways 400 and 27. In addition, some major centers in the Zone can be reached by rail (Barrie and Orillia) and by air (Collingwood and Midland).

As well as describing the distance between the study area and its major markets, Drawing 1 also identifies a number of major attractions located throughout Southern Ontario. These attractions, which range from national parks to film festivals, can serve as either direct competitors competing for the same market segments or as stepping stones that lead the tourist to within a reasonable distance of the study area. When the latter occurs, the tourist may decide to visit the tourism and recreation amenities located throughout the Collingwood-Midland-Orillia Zone. To illustrate the former, the cottage districts of the Muskoka and Kawartha Lakes at present compete directly with the Zone for summer day-use and weekend markets while Canada's Wonderland, once completed, may stimulate increased use and enjoyment of the alternative attractions located throughout the Zone.

2.3 Resource Analysis Summary

2.3.1 Approach to Resource Analysis

Tourism and recreation activities can be divided into three groups; a) those primarily dependent upon special natural resources, b) those primarily dependent upon special cultural resources (including past and present); and c) those not heavily dependent upon either special natural or cultural resources. Hence a resource analysis program must evaluate both the natural resource base and the cultural resource base to determine the potential of an area for supporting tourism and recreation activities.

For this study an ecological basis for resource analysis was selected. First, the entire zone was divided on the basis of land forms into eleven major regions. These physiographic regions correspond to those outlined by Chapman and Putnam in the Physiography of Southern Ontario. Although broad, each physiographic region is fairly distinct with a particular geological history, and its description provides some indication of the type of recreation activities that can be carried out there. For the purposes of this study, this description was not specific enough to allow for a detailed determination of its potential for a wide variety of activities. Hence each physiographic region was subdivided further on the basis of soil characteristics, drainage patterns, vegetation communities, slope and relief characteristics resulting in 41 distinct landscape units (Figure 1 and Drawing 2).

The specific resources and tourism development contained within each landscape unit were then evaluated on the basis of the following criteria and given a relative rating of high (3), moderate (2), low (1) or nil (0). Figure 1 portrays the results of this evaluation.

- a) Natural Resources: were evaluated on the basis of degree of diversity, quality and significance, extent and suitability for tourism and recreation activities.
- b) Historical and Archaeological Resources: were evaluated on the basis of degree of abundance, distribution pattern, quality and significance and diversity of these relationships.
- c) Outdoor Recreation Resources: were evaluated on location, number, quality and diversity.
- d) Human (Cultural) Resources: were evaluated on degree of abundance, distribution pattern, significance and diversity of interests.
- e) Tourism/Recreation Facilities: were evaluated on the basis of degree of abundance, distribution pattern and type.

- Physiographic Unit
— Landscape Unit



**Physiographic/
Landscape Units**

Landscape Unit Evaluation Matrix

[illegible]

Figure 1

2.3.2 Resource Analysis Summary

An overview of the relative resource values assigned to each landscape unit is given in Figure 2, together with a brief statement outlining the primary reasons for that assessment. Drawing 2 graphically depicts the location of the relative resource values, and the following summaries identify some of the major characteristics of selected resource components. Readers requiring greater detail about each landscape unit and its potential for tourism development are referred to Chapters 2, 3 and 4 of Volume 2: The Technical Appendix.

a) Natural Resources

In general, the greatest resource values occur in landscape units containing a greater diversity of land and water features. Bluffs, incised valleys and glacial features like moraines create a topographic, biological and visual contrast that increases the attraction and capability of the area for a wide range of tourism and recreation activities. Lakes, rivers, marshes and other water features that support a variety of water-oriented recreation activities enhance the landscape unit's potential for tourism development. As a result, it is not surprising that all landscape units identified as containing higher natural resource values are located along the Niagara Escarpment, encompass river watersheds, about the Georgian Bay, occur throughout the Pre-Cambrian Shield or lie along the shores of Lake Couchiching and Lake Simcoe.

As Figures 1 and 2 illustrate, the potential for various types of tourism and recreation activities are distinctly different among the landscape units. Some, like the Beaver Valley Slopes, Blue Mountain, Pretty River Valley, the

FIGURE 2

SUMMARY OF TOURISM AND RECREATION RESOURCES

LANDSCAPE UNIT	RESOURCE	NATURAL RATING/ATTRIBUTE	HISTORICAL/ARCHAEOLOGICAL RATING/ATTRIBUTE	OUTDOOR RECREATION RATING/ATTRIBUTE	HUMAN RATING/ATTRIBUTES	TOURISM/RECREATION FACILITIES RATING/ATTRIBUTES
Georgian Bay Islands		HIGH - Significant water resources, highly attractive landscape, amenable climate.	MEDIUM-LOW - Lack of historical/archaeological Sites and theme potential.	MEDIUM-HIGH - Excellent for water oriented activities, rugged topography limits land based activities except in winter.	MEDIUM - Lack of developed event and attractions, poor agricultural lands, low permanent population.	HIGH - Good accommodation both roofed and campgrounds, abundant Crown land for structured and unstructured recreation.
Severn Waterway		MEDIUM-HIGH - Significant water and forest resources, attractive landscape.	MEDIUM-HIGH - Historic water route, good historical theme potential.	MEDIUM-HIGH - Excellent for water oriented activities, rugged topography limits land based activities except in winter.	MEDIUM - Lack of developed event and attractions, poor agricultural land, low permanent population.	HIGH - Good accommodation both roofed and campgrounds, good support services, abundant Crown land for recreation (programmed and non-programmed).
Matchedash Lakeland		MEDIUM-HIGH - Significant water and forest resources, numerous marshes and wilderness characteristics.	MEDIUM-HIGH - Moderate historic and archaeological potential, good potential for historical theme development.	MEDIUM-HIGH - Excellent for water oriented activities, rugged topography limits land based activities except in winter.	MEDIUM-LOW - Low permanent population, lack of event and attractions, poor agricultural land.	MEDIUM-HIGH - Low accommodation, extensive recreational Crown land.
Lake Couchiching Shoreline		LOW - Extensive water resources, low topographic appeal, lack of significant natural resources.	MEDIUM-HIGH - Good historical resources, poor archaeological and historical theme development potential.	MEDIUM - Good for water based activities, poor for land based activities summer and winter.	MEDIUM - Lack of attractions and events, low permanent population.	MEDIUM-LOW - Lack of accommodation and Crown lands, poor support services.
Black River Plain		MEDIUM-LOW - Fair ecological diversity, extensive forest cover, lack of water.	LOW - Archaeological potential low, lack of historical sites.	LOW - No water base, extensive winter activities fair.	MEDIUM-LOW - Low population, lack of events and attractions.	MEDIUM-LOW - Lack of accommodation, some programmed Crown land.
Christian Island Group		MEDIUM-HIGH - Significant visual, topographic, water and forest resources.	MEDIUM-HIGH - Good number of historical sites, some archaeological potential.	MEDIUM-HIGH - Excellent for water based activities of all forms.	MEDIUM - Lack of events and attractions.	MEDIUM-LOW - No accommodation, fair unprogrammed Crown land, limited recreational areas.
Peninsula Head		MEDIUM-HIGH - Significant visual, topographic, water, forest and ecological diversity/resources.	HIGH - Rich in historical and archaeological sites, good historical theme potential.	HIGH - Excellent for most forms of water and land based activities summer and winter.	MEDIUM-LOW - Air natural attractions, lack of developed events and attractions, some agricultural activity.	MEDIUM-LOW - Fair-poor accommodation, good programmed Crown land, poor support services.
Tay Harbour		HIGH - Significant visual, topographic and ecological diversity, extensive forest and water resources.	HIGH - Rich in historical and archaeological sites, good historical theme potential.	HIGH - Excellent for most forms of water and land based activities summer and winter.	HIGH - Good diversity of events and attractions.	HIGH - Good accommodation and support services and transportation, extensive programmed Crown land.
Simcoe Upland		MEDIUM-LOW - Fair to good topographic, visual and ecological diversity, good forest cover, poor water resources.	HIGH - Rich historical and archaeological and historical theme development potential.	MEDIUM-LOW - Fair to good for land based recreation, poor for water based recreation.	MEDIUM-LOW - Good agricultural resource, lack of events and attractions.	MEDIUM-HIGH - Good transportation access, extensive Crown land for recreation, good support services, fair-poor accommodation.
Medonte Uplands		MEDIUM-LOW - Fair to good topographic, visual and ecological diversity, good forest cover, poor water resources.	MEDIUM-HIGH - Low historical value, good archaeological potential.	MEDIUM - Good for land based activities summer and winter, poor for water based recreation.	MEDIUM - Good agricultural resource, lack of events and attractions.	MEDIUM-LOW - Lack of accommodation, fair access, poor support services and Crown land for recreation.
Oro Sandhills Moraine		MEDIUM - Fair to good topographic, visual and ecological diversity, good forest cover, poor water resources.	MEDIUM-HIGH - Fair to poor historical resources, good archaeological potential.	MEDIUM - Suitable primarily for limited forms of summer and winter land based activities.	HIGH - Good natural attractions, lack of events and attractions.	MEDIUM-HIGH - Lack of accommodation and support services, extensive private and Crown recreation lands.
West Lake Simcoe Shoreline		MEDIUM-LOW - Good water resources but overly exposed shoreline, fair to poor for visual, topographic and ecological diversity.	MEDIUM - Fair to poor historical and archaeological resources and potential.	HIGH - Suitable for water based activities and limited forms of winter land and water based activities.	MEDIUM-HIGH - Good agricultural land, good number of seasonal events and some natural attractions.	MEDIUM-HIGH - Good accommodation, poor support services, good access and private recreation facilities.

SUMMARY OF TOURISM AND RECREATION RESOURCES

LANDSCAPE UNIT	RESOURCE	NATURAL RATING/ATTRIBUTE	HISTORICAL/ARCHAEOLOGICAL RATING/ATTRIBUTE	OUTDOOR RECREATION RATING/ATTRIBUTE	HUMAN RATING/ATTRIBUTES	TOURISM/RECREATION FACILITIES RATING/ATTRIBUTES
Lake Couchiching Shoreline		MEDIUM - Good water resources and favourable climate, fair-poor visual, ecological and topographic diversity, limited forest cover.	HIGH - Good historical and archaeological resources and historical theme development potential.	HIGH - Good water based activities summer and winter, limited land based activities.	HIGH - Good events and attractions, lack of good agricultural land.	HIGH - Good accommodation, support services and access.
East Lake Simcoe Shoreline		MEDIUM - Good water resources and favourable climate, fair-poor visual, ecological and topographic diversity, limited forest cover.	MEDIUM - Fair-poor historical and archaeological resources.	HIGH - Good water based activities summer and winter, limited land based activities.	MEDIUM-LOW - Lack of events and attractions, fair-poor agricultural lands.	MEDIUM-HIGH - Fair accommodation, poor support services and access, extensive programmed Crown lands.
Couchiching Plain		LOW - Fair-poor visual, topographic and ecological diversity, poor water resources, fair forest cover.	MEDIUM - Fair-poor historical and archaeological resources.	MEDIUM-LOW - Best suited to winter land based activities, lack of water resources severely limits summer activities.	MEDIUM-LOW - Good agricultural land, lack of events and attractions.	MEDIUM-LOW - Poor accommodation, support services, access and recreational lands (Crown and private).
Mara Drumlin Field		LOW - Good ecological and topographic diversity, poor forest and water resources.	MEDIUM-HIGH - Good historical resources and theme development potential.	MEDIUM-LOW - Best suited to winter land based activities, lack of water resources severely limits summer activities.	MEDIUM-HIGH - Excellent agricultural lands, specialty crop area, lack of events.	MEDIUM-LOW - Poor accommodation, fair support services and access, good Crown land availability for unstructured activities.
Simcoe Plain		MEDIUM-LOW - Lack of water resources, poor-fair forest cover and topographic, visual and ecologic diversity.	MEDIUM - Poor historical and archaeological resources.	MEDIUM-LOW - Most suitable for limited forms of winter land based activities.	LOW - Fair-poor agricultural land, lack of attractions and events.	MEDIUM - Poor accommodation, good support services and transportation system.
Carden Plain		LOW - Lack of water resources, poor-fair forest cover and topographic, visual and ecologic diversity.	MEDIUM-LOW - Poor historical and archaeological resources.	MEDIUM-LOW - Most suitable for limited forms of winter land based activities.	MEDIUM-LOW - Fair-poor agricultural land, lack of attractions and events.	LOW - Poor accommodation, support services, access and availability of recreation lands.
Elmvale Plain		MEDIUM-LOW - Lack of water resources, poor-fair forest cover and topographic, visual and ecologic diversity.	MEDIUM - Poor historical and archaeological resources.	MEDIUM-LOW - Most suitable for limited forms of winter land based activities.	MEDIUM-HIGH - Good agricultural land, specialty crop area, a number of seasonal events.	MEDIUM-HIGH - Fair accommodation, good support services and access, extensive Crown lands for recreation.
Nottawasaga River Valley		MEDIUM-HIGH - Good visual, topographic, ecological and geological diversity, fair forest cover and water resources.	HIGH - Rich in historical and archaeological resources, good historical theme development potential.	MEDIUM-LOW - Fair for water based activities and winter land based activities.	MEDIUM-LOW - Good agricultural lands for specialty crops, lack of events and attractions.	MEDIUM-LOW - Poor accommodation, support services, access and lands for recreation.
Minesing Wetlands		MEDIUM-HIGH - Rich ecological and geological resources, significant wetland for fish, wildlife and flora.	MEDIUM - Fair-poor historical and archaeological resources.	LOW - Extensive and intensive summer activities of a limited form, i.e. canoeing, bird watching.	MEDIUM-LOW - No attractions and events or agricultural practices.	MEDIUM-LOW - Extensive non-programmed Crown land for nature interpretation and appreciation.
Stayner Plain		LOW - Fair-poor visual, topographic and ecological diversity, limited forest and water resources.	MEDIUM - Fair-poor historical and archaeological resources.	MEDIUM-LOW - Limited forms of winter and summer land based activities.	LOW - Good agricultural land, lack of events and attractions.	MEDIUM-LOW - Good access and support services, lack of accommodation and lands for recreation.
Corn Hill Moraine		MEDIUM-LOW - Fair topographic, visual and geological diversity, limited water and forest resources.	MEDIUM-HIGH - Fair-poor historical resources, good archaeological potential.	MEDIUM-LOW - Best suited to limited forms of winter land based activities.	LOW - Good agricultural lands, lack of events and attractions.	MEDIUM-LOW - Poor accommodation, access, support services and lands for recreation.
Wasaga Beach		MEDIUM - Good water and forest resources, good ecological and visual diversity.	HIGH - Rich historical and archaeological resources.	HIGH - Highly suited to all forms of water oriented activities and many land based activities on year-round basis.	HIGH - Good events and attractions, lack of good agricultural land.	HIGH - Good accommodation, support services, access and lands for recreation.
Collingwood Shoreline		MEDIUM-HIGH - Fair-good visual, topographic, ecological and geological diversity, good water resources.	HIGH - Numerous historical sites and excellent potential for historic theme development.	MEDIUM-HIGH - Highly suited to diversity of summer water and land based and some winter water based activities.	MEDIUM - Good cultural events, fair agricultural land and attractions.	MEDIUM-HIGH - Good accommodation, access and support services, fair amount of structured Crown land.

SUMMARY OF TOURISM AND RECREATION RESOURCES

LANDSCAPE UNIT	RESOURCE	NATURAL SETTING/ATTRIBUTE	HERITAGE/ARCHAEOLOGICAL RATING/ATTRIBUTE	OUTDOOR RECREATION RATING/ATTRIBUTE	HUMAN RATING/ATTRIBUTES	TOURISM ACCOMMODATION RATING/ATTRIBUTES
Upper Beaver Valley		MEDIUM-HIGH - Fair-good visual, topographic, ecological and geological diversity, good water resources.	MEDIUM - Fair-poor historical and archaeological resources.	HIGH - Highly suited to a diversity of summer and winter land and water based activities.	MEDIUM - Lack of high quality agricultural lands, events and attractions.	MEDIUM-LOW - Some accommodation, poor support services and transportation system, lack of land for recreation.
Mad River Valley		MEDIUM-HIGH - Good diversity of visual, topographic, geological and ecological diversity, good water resources.	MEDIUM-HIGH - Fair-poor for historical resources but good archaeological potential.	MEDIUM-HIGH - Well suited to variety of summer and winter land based activities. Water based activities limited in type.	MEDIUM - Lack of high quality agricultural lands, events and attractions.	MEDIUM-LOW - Lack of accommodation, support services and transportation system; extensive non-programmed Crown lands.
Pretty River Valley		MEDIUM-HIGH - Good diversity of visual, topographic, geological and ecological diversity, good water resources.	MEDIUM-HIGH - Fair-poor for historical resources but good archaeological potential.	MEDIUM-HIGH - Well suited to variety of summer and winter land based activities. Water based activities limited in type.	MEDIUM - Lack of high quality agricultural lands, events and attractions.	MEDIUM-LOW - Lack of accommodation, support services and transportation system; extensive non-programmed Crown lands.
Blue Mountain		MEDIUM - Excellent topographic and visual diversity, fair ecological diversity and forest cover, limited water resources.	MEDIUM-LOW - Lack of significant historical and archaeological resources.	MEDIUM-LOW - Best suited to winter land based activities primarily skiing and limited summer land based activities such as hiking.	HIGH - Good events, some developed attractions, lack of high quality agricultural lands.	MEDIUM - Fair accommodation and services, good access and private recreation land.
Ravenmore Slopes		MEDIUM-HIGH - Excellent topographic and visual diversity, fair ecological diversity and forest cover, limited water resources.	MEDIUM-LOW - Lack of significant historical and archaeological resources.	MEDIUM-LOW - Best suited to winter land based activities and limited forms of summer land based activities.	LOW - Good agricultural land, lack of events and attractions.	LOW - Poor accommodation, support services and access and lands for recreation.
Beaver Valley Slopes		MEDIUM-HIGH - Excellent visual, topographic, geological and ecological diversity, significant forest cover, limited water resources.	MEDIUM-LOW - Lack of significant historical and archaeological resources.	MEDIUM-LOW - Best suited to winter land based activities and limited forms of summer land based activities.	MEDIUM - Lack of events and attractions and high quality agricultural lands.	MEDIUM-HIGH - Fair-good accommodation, poor support services and transportation infrastructure, good availability of Crown lands.
Upper Beaver Valley		MEDIUM-LOW - Excellent visual, topographic and geological and ecological diversity, significant forest cover, limited water resources.	MEDIUM-LOW - Lack of significant historical and archaeological resources.	MEDIUM-LOW - Best suited to winter land based activities and limited forms of summer land based activities.	MEDIUM - Lack of events and attractions and high quality agricultural lands.	MEDIUM-LOW - Poor accommodation, support services, access and lands for recreation.
Lower Beaver Valley		HIGH - Excellent visual, topographic, geological and ecological diversity, good forest cover, limited water resources.	MEDIUM-LOW - Lack of significant historical and archaeological resources.	MEDIUM-LOW - Best suited to summer and winter based activities and limited forms of summer water based activities, i.e. canoeing.	MEDIUM-LOW - Lack of events and attractions, good agricultural accessibility.	MEDIUM-LOW - Lack of accommodation, support services and transportation infrastructure, extensive unstructured Crown land.
Kalbarrie Uplands		MEDIUM-HIGH - Excellent visual, topographic, geological and ecological diversity, limited water resources, good forest cover.	MEDIUM - Good historical resources, low archaeological potential.	HIGH - Highly suited to diversity of summer and winter land based activities and some forms of water based activities.	LOW - Good agricultural land and events, lack of attractions.	MEDIUM-LOW - Lack of accommodation, support services and Crown land. Fair access and water access areas.
Beaver & Mad River Uplands		MEDIUM-HIGH - Excellent visual, topographic, geological and ecological diversity, good water and forest resources.	MEDIUM-LOW - Fair-poor historical and archaeological resources.	MEDIUM-HIGH - Best suited to a diversity of summer and winter land based activities.	MEDIUM-LOW - Good agricultural land, lack of events and attractions.	MEDIUM-LOW - Poor accommodation, support services and transportation infrastructure, extensive unstructured Crown land.
		MEDIUM-HIGH - Good visual, topographic, geological and ecological diversity, good water and forest resources.	MEDIUM-LOW - Fair-poor historical and archaeological resources.	MEDIUM-HIGH - Best suited to a diversity of summer and winter land based activities with limited forms of summer water based activities.	MEDIUM-LOW - Good agricultural lands, fair events, lack of attractions.	MEDIUM - Fair-poor accommodation, support services and recreation land; fair and limited transportation network.

FIGURE 2

SUMMARY OF TOURISM AND RECREATION RESOURCES

LANDSCAPE UNIT RESOURCE	NATURAL RATING/ATTRIBUTE	HISTORICAL/ARCHAEOLOGICAL RATING/ATTRIBUTE	OUTDOOR RECREATION RATING/ATTRIBUTE	HUMAN RATING/ATTRIBUTES	TOURISM/RECREATION FACILITIES RATING/ATTRIBUTES
Oxprey Wetlands	MEDIUM-LOW - Significant wetland of ecological importance.	LOW - Lack of both historical and archaeological resources.	LOW - Suited to very limited and controlled forms of recreation, i.e. nature interpretation.	MEDIUM-LOW - Lack of events and attractions, poor agricultural capability.	MEDIUM-LOW - Poor accommodation, support services, access; extensive Crown land for passive use.
Saugeen River Uplands	MEDIUM-LOW - Good topographic; visual and geological diversity; lack of wetlands, water and forest resources.	MEDIUM-LOW - Few historical and archaeological resources.	MEDIUM-LOW - Best suited to variety of winter land based activities and limited forms of summer water/land based activities, i.e. fishing, nature interpretation.	MEDIUM-LOW - Lack of events and attractions, poor agricultural capability.	MEDIUM-LOW - Fair-poor facilities, infrastructure; fair-good transportation infrastructure.
Rocklyn Plain	MEDIUM-LOW - Fair-good visual and ecological diversity, some wetlands, limited water resources, good forest cover.	MEDIUM-LOW - Few historical and archaeological resources.	LOW - Moderately suited to limited forms of summer/winter land based activities.	MEDIUM-LOW - Lack of events and attractions, poor agricultural capability.	MEDIUM-LOW - Lack of accommodation, support services and transportation infrastructure, good amount of unstructured Crown land.
Bighead Valley	MEDIUM-HIGH - Excellent topographic, visual, geological and ecological diversity, good water resources.	MEDIUM-LOW - Few historical and archaeological resources.	MEDIUM-HIGH - Variety of summer water/land based activities and some winter land based activities	LOW - Lack of events and attractions, good agricultural land, specialty crops.	MEDIUM-LOW - Lack of accommodation, support services and recreation lands, good transportation system.
Cape Rich Steps	HIGH - Excellent topographic, visual, geological and ecological diversity, good water resources.	MEDIUM-LOW - Few historical and archaeological resources.	MEDIUM-LOW - limited potential for recreation due to Federal ownership (tank range).	LOW - Lack of events and attractions; high quality agricultural land.	MEDIUM-LOW - Lack of tourism and transportation infrastructure, lack of recreational lands.

Medonte Uplands and the Oro Sandhill Moraine, provide opportunities for specific activities requiring variations in height such as alpine skiing, grass skiing and hang gliding as well as the associated activities of hiking, cross-country skiing and nature appreciation. Other landscape units, including the Severn Waterway, Matchedash Lakeland and the Nottawasaga River Valley provide opportunities for totally different types of recreational experiences such as canoeing, wilderness camping, hunting and fishing. Finally, the potential for a diversity of water-oriented tourism and recreation activities including swimming, boating, windsurfing and scuba diving characterize the Georgian Bay Islands, the Peninsula Headlands, the Tiny Township Shoreline, Lake Couchiching and other shoreline landscape units. These distinct potentials must be kept in mind during the preparation of a Zone-wide Tourism Development Strategy.

b) Historic and Archaeological Resources

Archaeological sites are extremely sensitive to disturbance and may easily be destroyed by inappropriate development and use. For this reason, with the exception of the Gwynne site within Awenda Provincial Park and the Cahiague site near Bass Lake, the Ministry of Natural Resources and the Ministry of Culture and Recreation do not plan to provide public access to the archaeological sites located throughout the study area. As a result, very little real opportunity exists within the Collingwood-Midland-Orillia Tourism Zone for the development and interpretation of specific archaeological phenomena.

Opportunities for the commemoration of historical and archaeological resources within the context of historic themes seems more feasible. As described in Chapter 4 of Volume 2: Technical Appendix, considerable development of historic resources has already taken place, especially in the

Midland-Penetanguishene area. The emphasis has been on the development of specific sites in a relatively uncoordinated fashion. A much more comprehensive approach which will fit the highly publicized existing attractions (identified in Drawing 10 - Volume 2) into a system of themes is recommended so that all of the historic resources located throughout the zone can be commemorated in an integrated fashion. For example, the old Penetanguishene and Coldwater Portage Roads and existing plaques and monuments can serve as a basis to interpret the military history. Francophone culture and influence could be used as a unifying theme to integrate the interpretation programs of developed historic resources throughout the Tiny-Tay Peninsula and the Midland area.

A similar approach is recommended for the Barrie-Nottawasaga River Valley route. Development of the historical resources in this area should be based upon both the fur trade and military history. Interpretation of historic resources in the Collingwood area can be based upon the themes of industrial development, Great Lakes shipping and the coming of the railroad. The ancestry of Native Peoples, the Francophone presence and settlement of the Severn River area can serve as a thematic framework for developing and interpreting the historic resources along the Trent-Severn Canal.

A number of urban settlements located throughout the study area including Meaford, Thornbury, Penetanguishene and Orillia contain architecturally interesting structures that impart to the town or village an atmosphere of historicity. The Ministry of Culture and Recreation, in an effort to retain these structures, is attempting to stimulate the restoration of older buildings wherever possible. These efforts should be supported by the Tourism Development Strategy.

c) Outdoor Recreation Resources

In general, outdoor recreation activities are resource specific requiring particular combinations of land and/or water features for a high quality experience. Hence, the diversity and quality of natural resources and features dictate, to a great degree, the diversity and quality of the recreation potential of any landscape area.

This correlation holds true for the study area, modified to a certain extent by micro-climatic conditions and cultural activities. As illustrated by Figure 2, the landscape units exhibiting the greatest diversity in topography and the greatest variety of water related features rate the highest for outdoor recreation potential for winter and/or summer activities.

The magnificent scenery and varied topography along the Niagara Escarpment make this area a valuable recreation and tourism resource, particularly suited for alpine skiing, hiking, cross-country skiing and scenic viewing. Comparatively, the Precambrian Shield, with its associated island archipelago - the 30,000 Islands - has a high potential for a wide variety of water-oriented recreation activities including boating, sailing, swimming and fishing.

As suggested, the outdoor recreation potential exhibited by the natural resources can be modified significantly by cultural activities. For instance, the Cape Rich Steps have excellent topographical, geological and ecological diversity with an inherently high capability for outdoor recreation. But because the area has been used as a tank range by the Federal Government, the restricted nature of that activity, coupled with the danger of unexploded shells, lower the outdoor recreation recreation potential significantly. Similarly agricultural production limit the outdoor recreation potential of such physiographic units as the Simcoe and Carden Plains.

d) Human and Cultural Resources

An important part of tourism involves the pleasant memories of a specific city, town or area that are often closely linked to the people, their customs, lifestyles and events and attractions. Hence the major attractions and events occurring throughout the Study Zone have been identified and categorized into type and significance (See Figure 6 and Drawing 9 - Volume 2). Unfortunately, there was no information on attendance or expenditures resulting from these events and attractions and no assessment could be made regarding their importance to the tourism industry. In general, however, with the exception of such events as the Barrie Winter Carnival and the Beaver Valley Rat Race, the identified fairs, festival and other special events are small, basically local to regional in significance, and do little to encourage travel to and through the Zone.

With the exception of the Town of Penetanguishene and the Township of Tiny, which have significant Francophone populations of 30% and 33% respectively, there are no significant representations of any ethnic groups within any of the communities in the study area. A number of residents of Dutch origin are found in the Townships of Flos, Sunidale and Vespra, and of German origin in the Township of Matchedash. These populations are of insufficient size to impart an ethnic flavour to the lifestyles within those Townships.

e) Physical Resources (Infrastructure)

In order to understand the nature and sufficiency of the Zone's infrastructure from a tourism industry perspective, a zone-wide analysis was undertaken which identified, mapped and assessed the Zone's commercial accommodation facilities, support services, developed recreational lands and transportation system.

Commercial Roofed Accommodation

Table 1 presents a summary of the type of tourist accommodation available throughout the study area. An analysis of the facilities listed indicated that:

- 64% of the roofed accommodation establishments and 51% of the units are seasonal.
- major urban motor hotels average 70 to 90 units, motels 10 to 20 units, resort lodges 20 to 30 units, commercial cottages 10 to 12 units, and campgrounds 74 sites per establishment.
- 94% of seasonal roofed accommodation was built prior to 1967, and only 8% is considered to be in good condition, 89% in fair condition and 3% in poor condition.
- 66% of the year-round roofed accommodation was built prior to 1967, and only 9% is considered to be in good condition, 86% in fair condition and 5% in poor condition.

Many of the existing establishments are too small to be commercially viable. Their owner/operators are either retired or have alternative employment to supplement the income obtained from this source. Such facilities can rarely be maintained adequately as they provide insufficient revenue; as a result, they tend to become run down and lose any competitive capability, and when new competing facilities are built, they go bankrupt. Their main market appeal is their low cost, and with commercial cottages, the availability of housekeeping facilities.

Private Cottages

There is no accurate source of data on the number of private cottages in the study area, but it is estimated that there are between 19,000 and 20,000 privately owned cottages. Private cottages have a major effect upon the actual demands placed upon the tourism and recreation facilities

TABLE 1

COMMERCIAL ACCOMMODATION IN STUDY AREA

	Motor Hotels/Motels		Resorts/Lodges		Cottages/Cabins		Total		Campgrounds	
	Estabs.	Units.	Estabs.	Units.	Estabs.	Units.	Estabs.	Units.	Estabs.	Units.
Study Area (1) - Total	145	2,808	35	1,143	215	2,119	395	6,070	85	6,300
- %	37%	46%	9%	19%	54%	35%	100%	100%		
Ontario (2) - Total	1,725	36,947	715	10,821	3,158	29,840	5,598	77,608	1,150 ⁽³⁾	15,000 ⁽³⁾
- %	31%	48%	13%	14%	56%	38%	100%	100%		
Study Area/Ontario	8%	8%	5%	11%	7%	7%	7%	8%	7%	5%

Note: (1) Study area inventory based on data in Ontario/Canada Accommodations, 1979.

(2) Ontario inventory taken from Ontario/Canada Tourism Statistical Handbook, 1979.

(3) Stevenson & Kellogg estimate.

and services of the Zone. Up to 74% of the people vacationing in the study area, and up to 82% of the weekend visitors stay in private cottages, effectively transforming themselves from long or short term overnight visitors to day-use visitors. This transformation shifts the focus of facilities and services demanded from commercial roofed accommodation and associated services to events, attractions and entertainment facilities.

Resorts and Activity Areas

A further breakdown of accommodation establishments was undertaken to provide an indication of the destination resorts found within the study area.

For the purpose of this study, a resort has been defined as a recreation facility or accommodation in combination with a recreation facility, which on its own draws non-residents or tourists to a particular area. For a further breakdown of the definition of a tourist resort refer to Section 3.4 of the appendix Volume.

In total there are 99 resorts identified within the Collingwood-Midland-Orillia Tourism Zone. Of these, 42 are roofed accommodation resorts, 23 are accommodation resorts with camping, 9 are campground resorts, 2 are vacation farms and 23 are activity areas.

Approximately 70% of the resorts identified are seasonal establishments, with approximately 84% of these being summer seasonal. The only areas with a number of year-round resorts are the Collingwood-Blue Mountain area and the Orillia-Lake Couchiching area. Summer seasonal resorts for the most part are focused around seasonal water oriented

activities such as boating, swimming and fishing. Alpine ski resorts and resorts catering to the ski area market are the majority of establishments operating during the winter season.

A large percentage of the summer seasonal establishments are cottage resorts or motel establishments which are too small to be commercially viable. This type of resort accounts for a good number of the resorts found in the Georgian Bay Islands and Tay Harbour areas.

Seven of the resorts are private clubs, six of which are alpine ski clubs and one is a fishing club. Being private clubs, public access is limited, but with each one there is some degree of public usage, at least as guests of members.

In summary, there is a good dispersion of resorts throughout the study area, but in a lot of cases these resorts require upgrading. Seasonal resorts tend to become rundown due to insufficient revenue from operating half the year or less. The major markets for the existing resorts appear to be the ski crowds in the winter and people looking for water oriented recreation in the summer.

Tourism Support Services

Support services, as shown on Drawing 7 of the appendix Volume, are those services which cater to the tourist's basic needs, including food and beverage establishments and automotive service centres.

All are well distributed throughout the study area, although concentrations exist in and around the larger urban communities. In type and quality, the service establishments appear to match the variety demanded by the various market segments.

The operating hours of the food, beverage and especially automotive service establishments located near the smaller urban centres, tend to discriminate against the evening traveller and may not be available when most needed.

Transportation

The existing road network throughout the study area is adequate to accommodate the present traffic load both during the summer and winter months. If the planned improvements and additions to the network occur, the resultant system will be able to accommodate the increases in traffic activity generated by either the development of new tourism and recreational activities or the planned growth of the major urban centres.

The major road network, as illustrated by Drawing 8 of the appendix Volume, is primarily north-south oriented and except for Highways 6, 10 and 24, radiate from the Barrie area throughout the Collingwood-Midland-Orillia Tourism Development Zone. The east-west connectors between the major urban centres and their related tourist attractions are of lower quality and are less efficient. These conditions make it more difficult and time-consuming for tourists to visit, in a one-day time span, the majority of the major attractions located throughout the Zone. The Zone is at present not well serviced by rail as far as passenger service is concerned. Passenger rail service is available only in the eastern portion of the study area from Barrie north. Freight service is available to Collingwood, Midland, Orillia and Barrie as well as to the smaller settlements located along the CP and CN lines.

2.4 Implications For Tourism Development

As a result of the resource analysis carried out for this study, the following concerns have been identified that must be considered during the preparation of a tourism development strategy for the Collingwood-Midland-Orillia Zone.

2.4.1 Natural and Outdoor Recreational Resources

- a) The natural resources of the study area are primarily of regional and local significance and have little capability to compete with those segments of the international and national markets looking for outstanding scenic values or high calibre recreational experiences.
- b) The most significant natural resources having the highest capability for tourism and recreation activities are located in the landscape units bordering the coastline from Meaford to Orillia, or throughout the landscape units having significant topographic variation. To utilize those capabilities the majority of future tourism and recreation developments must occur throughout those landscape units.
- c) Because of the diversity of natural resource values occurring throughout the Zone, even landscape units having similar total resource values, differ greatly in their capability to support particular types of tourism and recreation activities. These differing capabilities suggest that a blanket approach to natural resource development and management may not be as suitable as an approach that is tailored to individual areas within the Zone.
- d) Most of the natural resource capability for supporting tourism and recreation activities is already developed and much of the remaining potential is publicly owned. Hence, co-operation between the private and public sector is essential to ensure that public developments complement and support private initiatives.

- e) Shoreline resources have a strong tourism and recreation attraction because of the land to water interface and their capability for supporting a diversity of recreational activities. Most of these resources are in private, non-recreational ownership and clear policies are required that will minimize the conversion of the remaining public shoreline to private ownership.

2.4.2 Historical and Archaeological Resources

- a) The significance and fragility of archaeological resources prevent the development of public access and site interpretive programs except in locations where their protection can be guaranteed.
- b) The Zones historical resource potential is high but, with some notable exceptions, largely unexploited because of lack of knowledge, leadership and funds. Effective development and commemoration will require the preparation of a theme structure that can form the basis for guiding resource selection, and the provision of professional and technical assistance for the research, planning, development and management of historic resources.

2.4.3 Human Cultural Resources

- a) A greater understanding of the contribution made by events and cultural attractions to the overall tourism industry of the zone is required before specific recommendations can be made with respect to the type of event or cultural activity that should be developed, elaborated and promoted.
- b) A wide variety of events based upon the culture and lifestyle of the Zone's residents occur throughout the year but these are neither effectively promoted nor designed to attract non-residents. Hence little benefit is received through increased visitation or extension of the tourist season.

- c) Few communities integrate their development and promotion activities carried out for their historic resources with their programs to promote cultural events and attractions occurring in the community, even though the potential exists to benefit from such an integration.

2.4.4 Physical Resources

- a) Commercial roofed accommodation offered to the tourist is generally old, in only fair condition and provides limited services. In many cases the quality of the existing facilities do not meet market expectations.
- b) A significant number of establishments are operated on a lifestyle rather than a business basis, leading to an acceptance by the operator of lower gross revenues, an incapability to upgrade the facilities and an unwillingness or inability to provide additional services expected by the user of that facility.
- c) Many accommodation establishments are marginally viable, in a weak financial position and unable to withstand strong competition from new establishments.
- d) Support services (restaurants, gas stations, entertainment facilities) on a zonal basis are adequate in number and distribution to meet the needs of the existing tourism and recreation markets. However, many of these are of a low calibre, are strongly seasonal and maintain inappropriate operating hours to fully cater to the touring public.
- e) The zone is generally well serviced by the existing road service, with some lowering of efficiency and volume capability along east-west travel corridors. Although this system is perceived by the tourism industry as inadequate in specific areas, it would appear that this perception is due more to traffic peaking and seasonality rather than network characteristics.

- f) The Zone is poorly serviced by both rail and air with only few major tourism attractions or service areas directly accessible by these alternative modes of transportation.
- g) The industry's perception of the natural resources and the physical plant is frequently inflated, resulting in a false awareness of the market segments which they can realistically attract.

3

Market Analysis and Implications for Tourism Development

3.0 MARKET ANALYSIS AND IMPLICATIONS FOR TOURISM DEVELOPMENT

3.1 Introduction

This chapter provides quantitative and descriptive data on the Study Area tourism market.

Short term market forecasts are provided for each market segment for the years 1980 to 1984. The projections are based primarily on trend extrapolation which does not take into account exceptional promotion or sudden socio-economic changes or disruptions which could cause major discontinuities in current trends. However, short-term forecasts are unlikely to be changed by such events and reflect the type of demand most likely to occur.

Data limitations make it impossible to identify the current level of tourism demand with complete accuracy. Available market data and its limitations are described in Chapter 5, Volume 2, Technical Appendix. We estimate the demand to be between 5.9 and 6.5 million person trips per year in 1980. Our five year projections show the market growing to between 6.4 and 7.0 million person trips per year by 1984. This represents an average annual growth of 2 per cent per year and a reasonable parameter for planning purposes. Table 2 contains our short term forecasts.

Sections within the chapter describe the market segments, provide a profile of travellers and trip characteristics, and identify activity preferences and specialty markets; and present the implications of the market analysis.

3.1.2 Definitions

International Market: Residents of an overseas country having a propensity to travel to Ontario (partially or entirely for personal enjoyment).

TABLE 2

MARKET FORECAST - PERSON TRIPS (,000) TO STUDY AREA

MARKET		1980	1981	1982	1983	1984
Ontario Residents	H	6,293.3	6,416.6	6,528.5	6,634.7	6,754.4
	L	5,733.9	5,846.3	6,020.7	6,118.6	6,229.1
Other Canadians	H	25.2	26.2	27.3	28.3	29.5
	L	23.4	23.9	24.4	24.8	25.3
U.S. Residents	H	144.3	140.6	137.5	134.1	131.0
	L	109.6	108.1	106.6	105.1	103.4
Other International	H	25.5	28.9	32.6	36.8	41.6
	L	17.7	19.2	20.8	22.6	24.5
TOTAL	H	6,488.3	6,612.3	6,725.9	6,833.9	6,956.5
	L	5,884.6	5,997.5	6,172.5	6,271.1	6,382.3

U.S. Market: Residents of the United States having a propensity to travel to Ontario.

Canadian Market: Residents of the Canadian provinces and territories other than Ontario having a propensity to travel to Ontario.

Provincial Market: Residents of Ontario having a propensity to travel in Ontario.

Metro-Toronto Market: Residents of Metro-Toronto having a propensity to travel to the Collingwood-Midland-Orillia Zone and elsewhere.

Regional Market: Residents of regions within Ontario having a propensity to travel within the confines of that region for the purpose of personal enjoyment.

Local Market: Local residents having a propensity to use nearby ($\frac{1}{2}$ to 1 hours driving time) tourism and recreation development for the purpose of personal enjoyment.

3.2 Market Segments

The market is separated into four major geographic segments. Particular consideration is given to Metro Toronto residents and to visitors to second-homes or cottages as important sub-segments of the market.

3.2.1 Ontario Residents

Ontario residents currently account for between 5.7 and 6.3 million person trips per year to the study area. We estimate the demand from this market segment will increase to between 6.2 and 6.8 million person trips by 1984. This represents an annual

average growth rate of about two per cent, consistent with the annual growth rate in person-trips, independent of destination. Ontario residents account for about 97% of all person trips to the study area.

3.2.2 Metro Toronto Residents

The Metro Toronto area is particularly important in that this segment provides 49% of Ontario residents' person trips to the study area. Of the 61% of Metro Toronto person trips which are for pleasure purposes, the study area attracts about $12\frac{1}{2}\%$ of this pleasure market.

If this market share increased to 15%, the result would be an additional 300 to 400 thousand person-trips per year. Such an increase would ensure that actual visitation would be closer to the high forecast than to the low forecast.

3.2.3 Other Canadians

Residents of the other Canadian Provinces currently account for between 23 and 25 thousand person-trips per year to the study area, about 0.4% of all person-trips. The demand for this market segment is expected to increase to between 25 and 30 thousand person-trips per year by 1984.

The projected average growth rate for this market segment is between two and four percent, a low rate when compared with the six percent annual average growth rate for inter-provincial travel. The low projection in growth rate for the study area is due to a perceived competitive disadvantage in terms of natural resources and tourism facilities.

About 80% of this market segment originates in the Province of Quebec and this situation is not expected to change. Furthermore, about 44% of the Quebec visitors stay in private homes or cottages indicating personal trips to the area.

3.2.4 U. S. Residents

U. S. residents currently account for between 109 and 144 thousand person trips per year to the study area, about 2% of all person trips. The projected average annual growth rate for this market segment is between 1½ and 2%.

The demand from this market segment is expected to decrease to between 103 and 132 thousand person trips per year by 1984.

Historically, this market segment has been shrinking. It is possible that this trend may change for reasons such as:

- the existing advantageous exchange rate;
- availability of gasoline;
- an improved perception of Canadians following the Iran hostage incident.

However, to ensure increased penetration of this large market, tourism facilities in the study area will have to improve and provide better service at competitive rates.

3.2.5 International Visitors

International visitors (excluding U.S. visitors) account for between 17 and 26 thousand person trips per year, about 0.3% of total person-trips. The projected average annual growth rate for this market segment is between 8½ and 13%.

The demand from this market segment is expected to increase to between 24 and 42 thousand person-trips per year by 1984.

The international market has been growing rapidly in recent years due to favourable currency exchange rates and suitable resources. Improved facilities and services are important considerations for ensuring that a reasonable share of this growing market goes to the study area.

3.3 Traveller Profiles And Trip Characteristics

Demographic profiles of visitors to the study area and trip characteristics for each market segment are presented in this section. Tables 3 & 4 provide a summary of the statistical data.

3.3.1 Ontario Residents

Demographically, the following characteristics appear important:

- 64% are over 35 years old; 13% are between 35 and 45 years old; and 23% are 45 years and over;
- male and female travellers are divided almost equally;
- 13% have a university or college education;
- 21% have household incomes of \$30,000 or more;
- one quarter (25%) of the parties are of 2 persons and one quarter (25%) are of 4 persons.

The primary characteristics of the trips are as follows:

- 53% of Ontario residents use private cottages for their accommodation in the area; 28% use the homes of friends and relatives; only 8% use hotels, motels or commercial cottages;
- 97% use a car or truck to travel to the area;
- 69% of the trips are for pleasure purposes, 26% are for visiting friends and relatives;
- 87% of trips involved an overnight stay in the area;
- just over one third (35%) occur in the summer months; only 13% occur in the winter;
- well over half of the trips (57%) from Ontario to the area originate in Metro Toronto.

TRAVELLER CHARACTERISTICS

Characteristics	MARKET			
	Metro Toronto Residents %	Ontario Residents %	Other Canadian Residents %	U.S. Residents %
Age: Under 20 years	41.0	39.6	14.3	31.4
20 - 34 years	20.1	24.2	51.0	19.3
35 - 44 years	16.1	13.0	13.2	13.3
45 - 64 years	18.6	19.4	14.0	19.5
65 years and over	4.2	3.8	7.5	16.5
Sex: Male	57.2	48.4	44.4	n/a
Female	42.8	51.6	55.6	n/a
Education: Public School	73.5	79.0	80.3	n/a
Some Post Secondary	8.9	7.6	-	n/a
Technical/Vocational/Jr. College	5.7	4.7	9.1	n/a
University Degree	11.9	8.7	10.6	n/a
Household Income: Under \$9,000	6.7	8.8	2.8	n/a
\$9,000 - \$19,999	18.3	25.2	44.3	n/a
\$20,000 - \$29,999	47.1	44.9	49.0	n/a
\$30,000 and over	27.9	21.1	3.9	n/a

Traveller Characteristics (cont'd)

Characteristics	MARKET			
	Metro Toronto Residents %	Ontario Residents %	Other Canadian Residents %	U.S. Residents %
Party Size: 1 person	18.9	19.1	4.5	n/a
2 persons	23.4	24.5	29.9	n/a
3 persons	24.0	19.0	13.7	n/a
4 persons	24.3	25.0	40.7	n/a
5 persons	9.0	7.6	11.2	n/a
More than 5 persons	0.4	4.8	-	n/a

Source: 1978 3rd Quarter Canadian Travel Survey.

1973-4 U.S. Auto Exit Survey.

TRIP CHARACTERISTICS

Characteristics	MARKET				
	Metro Toronto Residents %	Ontario Residents %	Other Canadian Residents %	U.S. Residents %	
Trip Purpose: Business	1.6	2.5	-	4.8	
Visiting	13.1	25.6	10.6	23.2	
Pleasure	82.1	69.1	89.4	72.0	
Personal	3.2	2.8	-	-	
Trip Duration: Day trip	15.6	13.1	17.3	5.7	
Overnight trip	84.4	86.9	82.7	94.3	
Transportation: Auto	96.7	96.9	87.0	n/a	
Air	0.2	0.1	11.6	n/a	
Bus	1.9	2.2	-	n/a	
Rail	0.1	0.1	1.4	n/a	
Boat	1.0	0.6	-	n/a	
Other	0.1	0.1	-	n/a	

Trip Characteristics (Cont'd)

Characteristics	MARKET				
	Metro Toronto Residents %	Ontario Residents %	Other Canadian Residents %	U.S. Residents %	
Accommodation: Hotel	0.7	1.3	9.0	22.4	
Motel	2.6	3.3	14.7		
Commercial Cottage	2.5	3.3	10.2	9.9	
Private Cottage	69.9	52.7	43.3	33.0	
Camping/Trailerpark	8.3	10.4	6.7	7.2	
Home of Friends/Relatives	14.5	27.5	16.1	27.5	
Other	1.5	1.5	-		

Source: 1978 3rd Quarter Canadian Travel Survey.
1973-4 U.S. Auto Exit Survey.

3.3.2 Metro Toronto Residents

Demographically, the following characteristics appear important:

- 61% are under 35 years of age; 16% are between 35 and 45 years old; and 23% are 45 years of age and over;
- 18% have university or college level education;
- 28% have household incomes of \$30,000 or more;
- people tend to travel in party sizes of two (24%), three (24%) or four (24%).

Primary characteristics of the trips are as follows:

- 70% of Metro Toronto's residents use a private cottage for their accommodation in the area; 15% use the homes of friends and relatives; only 6% use hotels, motels or commercial cottages;
- car or truck is the most dominant mode of transportation, accounting for 97% of travel to the area;
- 82% of trips are for pleasure purposes; only 2% are for business reasons;
- 84% of trips involved an overnight stay in the area;
- just over one-third of the trips (36%) occur in summer; only 11% occur in the winter months.

3.3.3 Other Canadians

Demographically, the following characteristics appear important:

- only 14% are under 20 years old, while 51% are between 20 and 34 years old; 13% are between 35 and 45 years old; 22% are 45 years of age or over;
- 20% have a university or college education;

- only 4% have household incomes of \$30,000 or more;
- parties tend to be 2 persons (39%) or 4 persons (41%).

Primary characteristics of trips include:

- 43% use private cottages for their accommodation in the area; a further 15% stay at the homes of friends and relatives; 34% make use of hotels, motels or commercial cottages;
- the automobile (car or truck) is the dominant mode of transportation (87%);
- 83% of the trips involve an overnight stay;
- the majority of residents of other Canadian provinces visiting the area live in Quebec.

3.3.4 U. S. Residents

Demographically the following characteristics appear important:

- 51% are less than 35 years old,; 15% are between 35 and 45 years old; and 34% are 45 years of age and over;
- the average party size is just under 3 persons (2.78%).
- the U. S. residents visiting the area tend to have higher household incomes, and more of them hold management/professional positions, than the overall profile of U.S. visitors to the province.

Primary characteristics of trips include:

- 33% use private cottages for their accommodation in the area; 28% stay with friends and relatives; 32% use hotels, motels or commercial cottages;
- almost three-quarters (72%) are visiting the region for pleasure purposes; 23% are visiting friends and relatives;
- 94% of trips involved an overnight stay in the area;

- three quarters of the trips (75%) occur during the summer months;
- 37% of the U.S. visitors to the area come from New York State; 30% come from Michigan; 9.5% come from Ohio; and 8.7% come from Pennsylvania.

3.4 Activity Preferences And Specialty Markets

3.4.1 Activity Preferences

Current, comprehensive data on activity participation at the sub-provincial level are not available. The most recent major study was conducted in 1973 and unfortunately was origin based, that is, the data are neither clear nor conclusive at the regional destination level. While we have received these data, they have not played a significant role in our analysis of the specialty markets.

However, the ten most frequent activities participated in, in the Georgian Bay area, are:

- recreational driving;
- visiting a cottage;
- boating;
- swimming;
- water skiing;
- fishing;
- snowmobiling;
- cross country skiing;
- downhill skiing;
- hiking.

3.4.2 Specialty Markets

a) Recreational Boating

A recent study, A Program for Recreational Harbours in Ontario (1979) estimates that 707,300 or 24% of households in Ontario owned 958,000 boats in 1978. The study estimates that there has been a 4% per year increase in boats since 1972 and this trend is expected to continue.

The study further estimated that 42% of Ontario residents participated once in some form of boating in the previous 12 months, accounting for 42.5 million boating occasions. In addition, a significant number of U.S. residents, 744,480, entered Ontario by boat; of those, 28% or 207,000 were in private boats.

Of the estimated 66 million boating occasions in Ontario, Georgian Bay accounts for 8.1 million (or 12%) and the Trent Waterway-Lake Simcoe region accounts for a further 10.1 million (or 15%).

The consultants predicted an increase in demand of 15.3% or an average annual growth rate of 2.5% in demand for berths in the Georgian Bay area at least until 1985. The increase in demand is expected to be 9.2% between 1985 and 1990.

The area has a strong competitive advantage over many other areas of Ontario due to its proximity to the major Metro Toronto market and the area's outstanding attributes for boating.

In general, the boating market is trading up to demand a greater variety and higher quality of facilities and services. The popularity of sail boating has grown rapidly in the latter half of the 1970's and it is expected that sailboats will become a larger segment of the boat population in the 1980's.

Demand for boats will continue to grow quickly in Ontario. Boats, particularly sailboats, are now perceived as good investments which appreciate quickly and are thus an attractive alternative to

investment in a cottage. The area, with its outstanding natural water resources can capitalize strongly upon this continued growth.

b) Downhill Skiing

In 1976, it was estimated that 6.7% or 420,000 residents of Ontario participated in downhill skiing. By comparison, 9.1% of Metro Toronto residents were downhill skiers.

A study in 1979 showed that 41% of Toronto skiers had skied 15 days or more during the previous season. Skiers averaged 1.7 ski trips (up to 3 days) and 0.7 ski vacations (4 days or more) each.

Of the ski trips, 50% lasted two nights, 95% were made by car, and 63% were within three hours travelling time from home. Twenty-four percent of these ski trips were to the Collingwood area and 57% were to other ski areas in Ontario.

The destinations for ski vacations were more widely dispersed; only 33% of vacations were in Ontario, and of those, 8% were spent in the Collingwood area. Sixty-four percent of destinations were within 6 hours travelling time and 74% of skiers used cars for transportation.

Although participation in downhill skiing is not growing as quickly as it did in the 1970's, or as quickly as participation in cross-country skiing, the growth in demand is expected to remain constant.

c) Cross-Country Skiing

Participation in cross-country skiing has grown rapidly during the 1970's. In 1970, when almost all cross-country skis were imported, Canada imported only 13,000 pairs. By 1978 domestic sales of such skis had reached 900,000 pairs per year.

In 1976 it was estimated that there were 363,000 cross-country skiers of 14 years of age and over, resident in Ontario, that represents 7.8% of the population across the province as a whole and a higher proportion than the number of downhill skiers. Toronto has a lower number of cross-country skiers (6.5%) than the provincial average (7.8%).

Parks Canada has projected a 1.9% yearly growth in participation in cross-country skiing over the period 1980 to 1985. It is to be remembered that the rate of participation grew steeply during the 1970's and is already at a relatively high level in Ontario.

The southern part of the area is felt to be the northern limit for a comfortable day trip for cross country skiing from Toronto. Snowfall is less reliable in the immediate proximity of Toronto. The area can therefore, market itself as having interesting trails with reliable snowfall within reasonable driving distance of Toronto.

d) Snowmobiling

It is estimated that in 1978 there were 253,000 households in Ontario owning one or more snowmobiles. This figure has been growing at the rate of about 2½% per year, roughly the same rate as household formation.

The Ontario Recreation Survey of 1973 found that 6.5% of Ontario residents on day trips to the Georgian Bay area participated in snowmobiling. However, only slightly over 2% of weekend or vacation trippers went snowmobiling. Since the time of the survey, participation in snowmobiling has grown more slowly than skiing. In fact, growth in snowmobiling appears to be associated only with population growth and not with increased participation rates or market penetration.

e) Waterskiing

Statistics Canada estimated that 125,000 persons in Canada participated in waterskiing during 1976. Waterskiing ranked 24th among recreational activities participated in by Canadians at that time. The Ontario Recreation Survey in 1973 found that waterskiing in the Georgian Bay area by Ontario residents was the 8th most frequently occurring recreational activity. The sport appears to be growing very slowly, if at all.

Neither Georgian Bay nor Lake Simcoe are considered to be good waterskiing areas. Hence we conclude that waterskiing is not a good focus for tourism development to the study area.

f) Recreational Cycling

In 1976, Statistics Canada estimated that recreational cycling ranked 11th in activities in which Canadians participated. It was estimated that about one million Ontario households owned one or more adult-sized bicycles. Bicycle ownership has been increasing at about 4% per year since 1976. Participation in the sport has been growing at about double the rate of growth of the population.

Recreational cycling has traditionally not been very successful as a tourism activity. Bicycle rental operations are usually financially nonviable. For recreational cycling to be successful in the area, a marketing strategy including group tours and links with mass transit from Metro Toronto would most likely have to be developed. Tourists would bring their own bicycles.

g) Windsurfing

In 1979 it was estimated that 2,500 windsurfing boards were sold in Canada - 20% of them in Toronto. Sales are believed to have been doubling every year since 1976. If so, there would only be

about 5,000 boards in Canada at this time. Projections for future growth are very positive - sales tripling every year between 1980 and 1985. If this occurs there will be about one million boards in Canada by 1984.

Nottawasaga Bay near Craigeleith is considered to be a prime location for windsurfing. It has already been used as the site for the 1977 North American Open Championship. Furthermore, the demographic profile of windsurfing is very similar to that of downhill skiers. Given Craigeleith's proximity to the Blue Mountain ski area this sport should be incorporated into the development planning for this area.

h) Visiting Historic/Cultural Attractions

The 1973 Ontario Recreation Study estimated that visiting a developed historic site was the tenth most preferred activity for a weekend trip and the sixth for a vacation trip. In 1979, 139,000 persons visited Sainte Marie among the Hurons, the major historic attractions in the study area.

Visitor surveys of such facilities indicate a low visitation by cottagers and local residents. As these sites are essentially passive, once seen there is little motivation for visitors to return.

Such attractions are strong market generators, especially if they are not static in nature.

i) Conventions and Corporate Meetings

A recent 1978 study indicated that about 75,300 people attended conventions and corporate meetings in the study area. These meetings contributed about 21% of total gross revenue to the facilities active in this market.

Analysis of the Convention and Corporate Meetings held in the study area indicate that the group meeting business is an important source of income. However, much of this business spends significantly less than the provincial average for such group meetings. Consequently, this portion of the market may be more sensitive to escalating costs, particularly transportation costs, and may not grow as quickly as might be hoped.

The business of handling corporate meetings has grown quickly in recent years. Despite the good geographical location of the area, it has yet to gain a significant share of this market. The market is extremely competitive and it will take considerable efforts on the part of the area's facilities to obtain a reasonable market share.

j) Tour Boats

Boat tours from the study area through the 30,000 Islands of Georgian Bay carried about 80,000 passengers embarking from Midland. The consultant estimates that a further 60,000 boat tour passengers embarked in Parry Sound. In contrast, 1,000 Island (St. Lawrence) Canadian tour operators in eastern Ontario carried about 200,000 passengers; U.S. tour operators carried another 225,000 passengers. The growth in the 1,000 Island tour boat business is 5% per year.

The 30,000 Island area has considerable potential for increased boat tour development. To achieve this, better linkages need to be established by boat tour operators with other sectors of the travel trade - bus tour operations, accommodation and other tourism commercial activities.

k) Resort Timesharing

Time sharing is a new concept which is rapidly gaining acceptance in North America. Essentially units or the right to use a unit are sold for specified weeks during the year. Typically these contracts cover a 15 to 20 year period.

During the last five years this market has been growing more than 40% per year. Most of this growth has occurred in the U.S. There are currently 12 timesharing locations in Canada, one of which is in the study area.

We anticipate that the Canadian market will grow rapidly. Development of this type of facility in the study area could have a major impact on the growth of tourism.

3.5 Implications For Tourism Development

- a) Metro Toronto and the surrounding area offer the best opportunity to increase the market for the study area. Specialty tours to particular areas or attractions within the zone could be promoted to travellers who are visiting the Metro Toronto area. It should be noted that increasing the market share through promotion will be extremely difficult unless the facilities and services are upgraded and competitively priced.
- b) Given the highly competitive nature of the tourism industry, consideration should be given to attracting the specialty markets to the study area.
- c) Shared-right-to-use schemes could be developed and promoted with all market segments.

In addition to the above, other implications of the market analysis are:

- d) The traditional Ontario market for second-home ownership can be expanded.
- e) The impact of increased energy costs should be mitigated by reducing dependence on automobile travel for Ontario residents to the area.

- f) Attempts should be made to hold the existing U.S. market through co-ordination of promotion and packaged tours. For this market, as for the Metro Toronto market, upgrading of facilities and services is essential.
- g) The expanding International market should be approached with promotion of tour packages.
- g) Touring from the province of Quebec should be promoted.

4

Societal and Leisure Trends and their Implications for Tourism Development

4.0 SOCIETAL AND LEISURE TRENDS AND THEIR IMPLICATIONS FOR TOURISM DEVELOPMENT

Social and economic trends developing to-day may be crucial for the future development of tourism in the Collingwood-Midland-Orillia area. These trends should be considered for both short and long term strategic planning.

The anticipated increased demand for recreational and vacation activities will have an impact on the social and economic life of host-communities, and on natural and environmental resources as tourism develops in response to demand. The development of tourism facilities therefore, requires consideration of local preferences and sensitivities as well as the economic benefits derived from tourism. The concentration of physical facilities into compact urban areas, where possible, is desirable in a society which is conscious of the need for conservation of natural and environmental resources that enhance its own enjoyment while they are protected for future generations.

4.1 Values And Lifestyles

In recent years, there have been dramatic changes in societal values and a growing acceptance for a range of lifestyles. Special interests associated with leisure time and vacations produce fragmented market demands with expectations that these special interests will be accommodated.

Prevalent social attitudes now stress the importance of physical-fitness, relief from work-related stress, developing skills and interests unassociated with work, an appreciation of natural phenomena and the importance of conservation.

Accompanying the changing views of work and leisure are socio-economic forces which reinforce the transformation of values. The increased participation of women in the work place, changing

family structures and family size, the increasing numbers of two-income families, early retirement, paid vacation and a "psychology of affluence" affect all sections of society. These trends combine to show a greater receptivity to travel and the use of leisure time to satisfy the multi-dimensional person.

In spite of economic conditions, vacations are perceived as important and necessary. Only minor curtailment of spending is expected in the eighties. Furthermore, there is a trend towards spacing vacation time over two or more seasons.

These societal trends imply a potentially larger market, but a market with diverse interests and expectations. The area's resources and facilities will have to cater to a wide variety of demands with respect to activities, attractions and accommodations.

4.2 Demographic Trends and Economic Prospects

Ninety-seven per cent of visitors to the Collingwood-Midland-Orillia area are Ontario residents. Therefore, the demographic characteristics of the province's population will affect significantly the size of the area's market and the type of resources required to meet the demand.

The annual growth rate of the Ontario population will decrease from 1% between 1981 and 1986 to 0.63% between 1991 and 1996. The composition of the population by age group is changing notably: the 0 to 19 years-old group will decrease steadily in the next 20 years; while the age groups from 40 to 64 years of age and over will increase; the 20 to 39 years of age group will remain relatively constant for the next 10 years and then will decrease.

With respect to the labour force, there will be a higher proportion of the population of working age than in the past sixty years. The annual growth rate of the labour force will be about 2% throughout the eighties, less than recent years, but higher

than the rate of population growth. The proportion of the over 65 years old group, the 45 to 65 years old group and women in the labour force will increase steadily in the next few years, while the proportion of the younger age groups will peak within 10 years and then fall.

The growth and aging of the population (and the work force) will have implications for the zone's tourism industry in a number of respects. Firstly, the size of the potential market is going to increase steadily. Secondly, the biggest growth will be seen in the 45 to 65 years of age group which is also the most affluent. The affluence and the interests of this group must necessarily be considered when planning for tourism, since its demands in terms of accommodation and activities will differ from other age groups. For example, by the 1990's there could be increased demand for high quality accommodation (such as luxury resorts and fully serviced condominiums), and more "passive" entertainment and recreation. The growing size of the over-64 group (which will make up 11.1% of Ontario's population by 1991) and the trend to early retirement could lead to increased demand for retirement homes and shoulder season tourism activities.

Although long term prospects for the economy are good, a slowing economic growth rate is projected for the eighties. (However, Ontario's service industry is expected to have the second largest increase in output and experience the largest gain in employment). While inflation will probably continue to grow at high rates throughout the eighties, unemployment will steadily decrease. Personal disposable income will continue to grow, although not at the same rate as in the past, so material standards of living will increase. (Between 1973 and 1977, personal disposable income grew at 13.8%, between 1978 and 1982 it is expected to grow at 8.8% and between 1983 and 1987 at 7.9%). If wages grow in the eighties at the same average rate as wages grew in the seventies, the average annual Canadian salary will

be \$38,000 by 1990. The family's disposable income will increase even further as more women join the work force. Economic trends indicate that the market size for the area's tourism industry will undoubtedly increase since people will have the means as well as the inclination to travel in the future.

4.3 Energy Cost

The energy situation, real and perceived, is going to play a major role in the future of tourism in Ontario and its various regions. A number of studies have examined the possible impact of gasoline rationing and price increases on pleasure trips.

The studies indicate that vacation travellers would adjust in a number of ways; by taking fewer trips; by travelling shorter distances; by switching from the use of private automobile to mass transit modes of transportation; by travelling to one destination per trip and remaining longer at destinations.

Tourist destinations far from major markets may experience a decrease in traffic while travel to destinations closer to home will increase. More specifically, one study showed that at rising gasoline prices (from current prices to over \$2.00 a gallon), the percentage of respondents who would cancel travel plans or would only travel a distance of less than one hundred miles steadily increased, while the number travelling by car decreased.

From an application of these studies to the tourism area and from discussions with local authorities, it is possible to arrive at the conclusion that the Collingwood-Midland-Orillia area is in a position to benefit from the energy crisis. As fuel prices rise and people cannot afford to take long distance vacations, the area's attractiveness will grow since it contains summer and winter recreation facilities and is within a hundred miles of the major market of Toronto. Furthermore, visitors lengths of stay could increase, since they might be making fewer trips.

4.4 Implications for Tourism Development

- a) Although societal trends and economic factors favour increased demand for tourism resources and facilities, the diversity of market segments and the highly competitive nature of the tourism industry make it essential that the 'tourism plant' meet high standards in facilities and services.
- b) As far as possible, facilities and services should be concentrated into urban areas to minimize the impact of tourism development on natural and environmental resources.
- c) It will become increasingly important for promotional programs and marketing strategies to match the characteristics of the tourism resources with specific expectations of market segments.
- d) Given the sophistication and diversity of services and facilities demanded by tourists, it is likely that the cost of operating accommodations, travel services and resort facilities will increase. Therefore, the operation of facilities will require considerable upgrading of managerial skills.
- e) There are increasing numbers of retired people with the time, money and freedom to travel year-round. If the facilities demanded by this group are available in both quantity and quality, there is potential for more year-round vacations and off-season travel.
- f) As travel costs increase, there will be a greater emphasis on pre-planned single destination vacations and for vacations that do not involve extensive use of the automobile.
- g) Increased costs will also lead to a greater demand for lower cost packaged tours, group travel, and a corresponding increase in use of energy-conserving modes of travel.

- h) Public mass transit linking the urban markets with tourism and recreational facilities may become more feasible and popular.
- i) Conflicts in the work/leisure schedules of working household members will lead to a demand for mini-vacations or weekend travel to specialized facilities within convenient distances.
- j) The private automobile will probably remain the dominant mode of travel for individuals and families over short distances.

5

Jurisdictions and Development Controls and Implications for Tourism Development

5.0 JURISDICTIONS AND DEVELOPMENT CONTROLS AND IMPLICATIONS FOR TOURISM DEVELOPMENT

The development of land within Ontario is affected by several levels of planning controls established by public review agencies and government policy documents. The following section identifies the role of planning in development, the agencies involved and the guidelines which have direct or indirect bearing on the development of the tourism within the study area.

Planning may be defined as a two-part activity consisting first of the establishment by government agencies of an overall development philosophy, and second, of the formulation and enforcement of policy directives (official guidelines, policy statements, plans, secondary plans, by-laws, etc.) which reflect that philosophy. These policy directives, as they exist within Ontario at the present time, are comprehensive and far-reaching. They embody not only the goals and objectives of government agencies, but also those of the diverse interests which are affected by any planning decision.

5.1 Administrative Jurisdictions and Responsibilities

The Collingwood-Midland-Orillia Tourism Zone encompasses a myriad of government jurisdictions with their corresponding review agencies which have administrative functions and regulatory powers over various forms of development. Figures 15, 16A and 16B (see Technical Appendix) indicate the complexity of provincial and federal agency responsibilities as they apply to the development of the tourism industry within the study area.

In addition to federal and provincial departments, ministries, agencies and commissions, development within the Collingwood-Midland-Orillia Tourism Zone is subject to review by two county

municipalities, one district municipality, two city municipalities, seven town municipalities, eight village municipalities, nineteen township municipalities, five joint planning areas and boards, four subsidiary planning areas and boards, and eight single independent planning areas and boards. Conservation Authorities, acting as autonomous review agencies also have regulatory powers over development within the watershed over which they have jurisdiction.

Two public agencies, CORTS and the Niagara Escarpment Commission, may have special influence over development within portions of the study area and therefore warrant some discussion.

5.1.1 CORTS

The Government of Canada and Ontario recognizes the Rideau-Trent-Severn Corridor as one of central Canada's most significant recreational resources. As a result, the official goal for the corridor is to develop a distinctive environmental corridor wherein a wide variety of recreational opportunities are available to users in a safe, pleasant and interesting environment and where optimum recreation use is achieved.

On February 20, 1975, the Governments of Canada and Ontario entered into the Canada-Ontario Rideau-Trent-Severn (CORTS) Agreement to implement the objectives of the CORTS Study Reports.

A CORTS report "Interim Land Use Guidelines" (December 1977), was released for consideration in future planning. These guidelines are intended for use by both government and private enterprise and indicate the character of the different parts of the corridor which should be preserved, as well as direction to be taken on a number of special issues. Recommendations contained in these guidelines have been incorporated into municipal Official Plans and supporting zoning by-laws.

Recreational management of the corridor is practiced by three levels of government. The lead agencies of the CORTS Agreement Board (e.g., Environment Canada and the Ministry of Natural Resources) provide a variety of opportunities for hiking, swimming, fishing, boating, and camping through the development of Provincial Parks and the operation of the Rideau-Trent-Severn waterways. Municipal governments and Conservation Authorities provide additional local parks, as well as swimming, camping, skiing, skating and cultural amenities, often with financial assistance from the senior governments.

Tourism and the general development of the tourism industry throughout the corridor is supported by the federal and provincial governments. Their agencies provide a variety of services to tourism entrepreneurs, ranging from loans to technical assistance. These agencies also endeavour to increase the demand for travel facilities and services through advertisement and promotion of the corridor in other regions.

5.1.2 Niagara Escarpment Commission

The Niagara Escarpment Commission (NEC) was established in 1973 by the Legislature of Ontario with the passage of the Niagara Escarpment Planning and Development Act in order to direct the preparation of a Master Plan covering the defined Niagara Escarpment Planning Area and to implement a limited system of Development Control.

The Plan for the Niagara Escarpment Area remains in draft form only and is still under discussion by public authorities and by the general public. Upon final Cabinet approval, the revised report will become the Provincial Plan for the Niagara Escarpment Area.

The basic goal of the Commission, as defined in the Niagara Escarpment Planning and Development Act is to prepare a plan "to provide for the maintenance of the Niagara Escarpment and land in its vicinity substantially as a continuous natural environment and to ensure that only such development occurs as is compatible with the natural environment".

The NEC has two main functions. First, as a review agency, it comments on development proposals, Official Plans and By-laws within its area of jurisdiction. As part of the Provincial Secretariat for Resources Development, the NEC carries out this function according to the terms of the Planning Act.

Second, the NEC is charged with the preparation of the Niagara Escarpment Plan under the terms of the Niagara Escarpment Development Act.

The draft plan suggests that built-up areas, cities and regions implement the policies of the NEC through Official Plan and Zoning By-laws. Prime agricultural areas, it suggests, will meet the requirements of a Niagara Escarpment Plan through conformity with the new Ontario Food Land Guidelines.

Recreational areas such as ski resorts and parks, and historical and sensitive natural areas within the existing protection area of the escarpment will be subject to continuing development controls.

Other land uses (e.g. forestry, aggregate extraction) will continue to be governed by the terms of Acts affecting those land uses.

5.2 Government Policies and Programs

Many jurisdictional boundaries and areas of responsibility overlap, resulting in a great potential for conflict in policy direction. While attempts have been made to formulate an overall provincial strategy for development, none now exists. Documents which attempt to regulate development on a regional scale have been produced. Those relevant to development within the study area include Design for Development: The Toronto Centred Region, the COLUC (Central Ontario Lakeshore Urban Complex) Report and the Simcoe-Georgian Area Development Strategy.

5.2.1 Design for Development: The Toronto Centred Region

In 1966, the Province launched two programs which a few years later culminated in a combined regional government/regional development program. The first of these programs was Design for Development, which divided the province into 10 regions.

The report for the Toronto-Centred Region (1970) was the first in a series of regional development reports under the Design for Development program and provided a basic concept for the comprehensive development of an area within an arc extending 90 miles from Toronto. Most of the study area, that is, roughly the lands between the Georgian Bay shoreline and the southern tip of Lake Simcoe, lies within the Peripheral Zone (Zone 3) of the Toronto-Centred Region; a much smaller area on the southern border of the study area lies within the Commutershed Zone (Zone 2).

The report was to be used as a guideline to be followed in all government decisions having an effect on the Region and as a basis for public reaction as to how the Regional Development Concept could be carried out and how the broad proposals contained in it could be made more specific.

Guidelines from the report have been used as a working guide for the various provincial departments and agencies involved in major development proposals of regional significance.

5.2.2 Central Ontario Lakeshore Urban Complex (COLUC)

In 1972, Design for Development, Phase III tied the regional government program firmly to the regional development program. The ten development regions were reduced to five planning regions. The Toronto Centred Rgion became one of these five, expanded and renamed the Central Ontario Region.

In 1974, the regional governments of Durham, Peel, Halton, Hamilton-Wentworth, Metropolitan Toronto and York formed the Central Ontario Lakeshore Urban Complex (COLUC) within the larger Central Ontario Region.

The policies contained in the COLUC Report were essentially those of Design for Development: The Toronto Centred Region with more attention given to specific issues and problems.

One recommendation made in the COLUC Report was the setting up of Task Forces to examine in detail several regions within the province. One of these regions was the Simcoe-Georgian Bay area which encompasses most of the Collingwood-Midland-Orillia study area.

The COLUC Report never received official status by the Ontario Cabinet. It is, however, used as a guideline for public and private decisions especially with regard to allocations of capital expenditures by government agencies.

5.2.3 Simcoe-Georgian Area Development Strategy

The terms of reference of the Simcoe-Georgian Area Task Force under the Design for Development Program were to devise a strategy for growth in the area consistent with stated local objectives and objectives formulated in the Toronto Centred Region Plan.

Essentially, the purposes of the strategy were to define a target population for the Simcoe-Georgian area for the year 2011, designate where within the area people should live, and to provide guidelines to implement development goals.

Policies formulated in the Simcoe-Georgian Area Development Strategy Study included several recommendations relevant to the development of the tourism industry in the Collingwood-Midland-Orillia Tourism zone.

The objective of the strategy, from a recreational and tourism point of view, was to make all locations more self-sufficient and to exploit the extended-use opportunities of the area. To this end, the report recommended:

- i) The preparation of a detailed recreational plan within the context of the development plan. This recreation plan would focus, in particular, on the shores of Lake Simcoe and Georgian Bay, and on the inland recreational resources such as the Oro Hills. Among the terms of reference for the recreation plan study were:
 - the designation of lands for resort areas, for seasonal and cottage uses, and for public parks and beaches. It is noted that the CORTS study proposed that the level of public ownership of land along Lake Simcoe should be brought up to about 15 per cent from its present three to five per cent.
 - The review of suitable locations for ski developments and, associated with this, the review of locations for recreational communities.

- Feasibility studies for the development of a new recreational community to take advantage of the four-season capability of the Collingwood-Wasaga Beach area.
- ii) Pending the completion of the study, favourable responses should be given to proposals for recreational community developments, on condition that these developments have the potential to reach a population level (about 1,000 people) at which an adequate level of services can be provided economically. Such development must be consistent with the growth rate and levels allocated to the particular municipality.
- iii) The conversion of seasonal to permanent dwellings in essentially recreational areas should be discouraged. This means a clear statement that only a limited number of absolutely essential services will be provided in such areas, unless they form part of a specific compact urban area. It is recognized that the long-term maintenance of seasonal uses is difficult, hence recommendation (ii).
- iv) No developments, save recreational developments should be permitted on 1st, 2nd, 3rd or 4th Class recreational lands outside urban areas until the completion of the recreation study.

The recommendations contained in the Simcoe-Georgian Area Development Strategy Study never received official status from the Cabinet. However, the study is used as a guideline for public and private decisions and is used by provincial ministries especially to establish priorities for capital expenditures within the Simcoe-Georgian Area. Many of the recommendations are incorporated into Municipal and Regional Official Plans.

5.2.4 Other Policies and Guidelines

In addition to the aforementioned regional plans, the following municipalities have, or are in the process of completing Official Plans (Status as of January, 1980):

District of Muskoka	-	approved 1975
Oro	-	approved 1969
Barrie	-	approved 1979
Collingwood	-	partially approved 1974
Cookstown	-	partially approved 1977
Couchiching	-	not approved - old plan repealed
Creemore	-	approved 1979
Elmvale	-	approved 1971
Elmvale-Flos	-	approved 1976
Innisfil	-	not approved - old plan repealed
Medonte	-	not approved - old plan repealed
Midland	-	approved 1978
Nottawasaga	-	approved 1978
Orillia	-	approved 1969
Penetang	-	approved 1974
Port McNicol	-	not approved
Stayner	-	approved 1974
Sunnidale	-	approved 1969
Tay	-	partially approved 1979
Tiny	-	approved 1971
Vespra	-	approved 1969
Tiny-Tay	-	not approved - draft plan likely to have major changes.
Victoria Harbour	-	not approved - draft plan likely to have major changes.
Wasaga Beach	-	not approved
Beaver Valley	-	approved 1974
Meaford	-	partially approved 1974
St. Vincent	-	partially approved

More specific and detailed Secondary Plans have been completed for eight areas in Tiny Township and four in Oro Township.

Other legislation and official policy which will affect the development of the tourism industry within the study area include the Planning Act, the Environmental Assessment Act, the Environmental Protection Act, the Conservation Authorities Act, the Niagara Escarpment Planning and Development Act, the Municipal Act, the Food Land Guidelines and the Agricultural Code of Practice.

Land Development Process

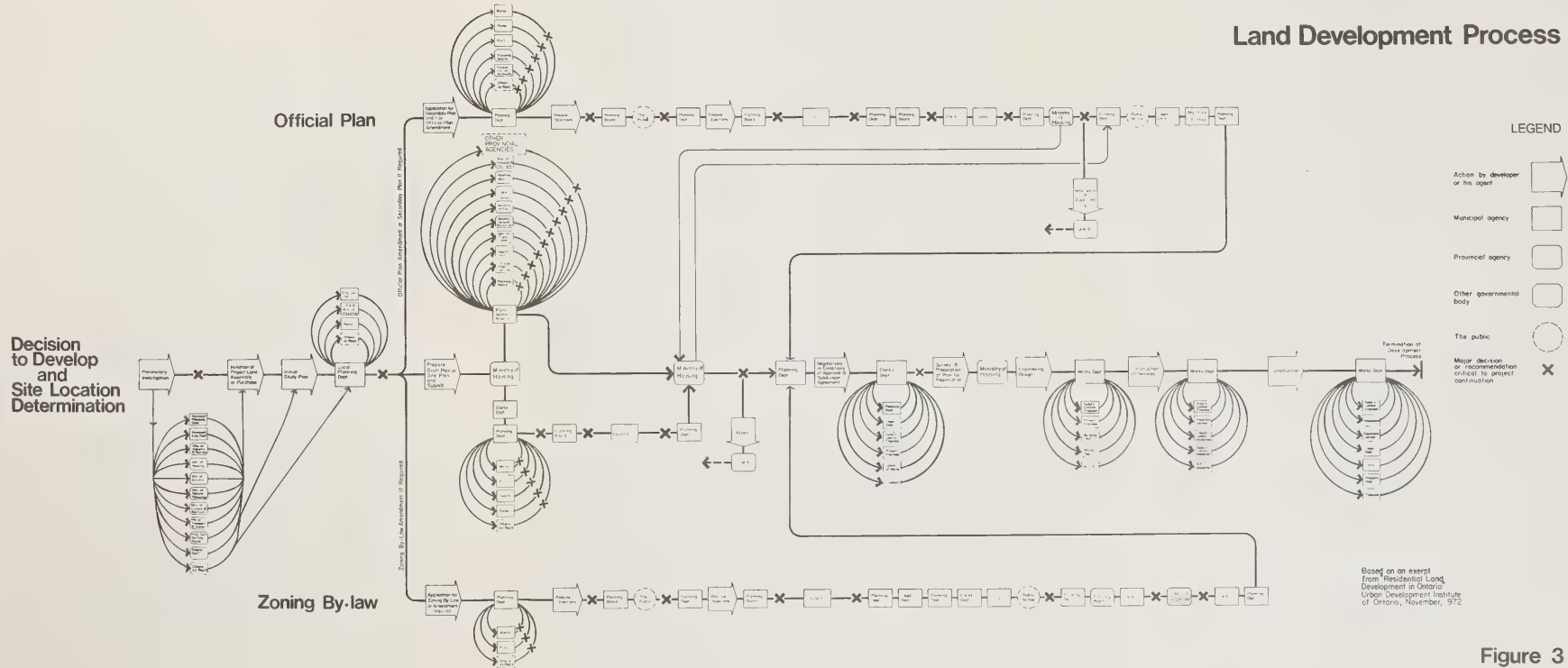


Figure 3

5.3 Land Development Process

The land development process must be responsive to concerns regarding aesthetic and functional design, public health, welfare and safety, and the ability of municipalities to provide a full range of public services to meet the needs of the entire community.

Figure 3 indicates the direction of the flow of information and decision making during the process of land development. As seen in this flow diagram, a development proposal is first submitted to the appropriate local municipality for review and local approval. It is then submitted for review and approval to consecutively higher levels of jurisdiction until the Minister of Housing or his designate gives final approval. In addition to the federal government and its various departments, development in Ontario can be reviewed by 22 provincial ministries and their various departments, and some 50 public agencies and Crown corporations.

5.4 Implications For Tourism Development

The several layers of jurisdictional overlap which affect land development create vast potential for conflict and/or ambiguity in policy directions, and consequently are an effective barrier to tourism development.

A conservative estimate of the time lag between the initiation of a potential development and the beginning of construction is three to five years. The corollary to time lag problems is that the data base for the development concept may be out of date and inappropriate when the approval process is finally complete.

If tourism development is to proceed within a coherent plan for the area, the plethora of federal, provincial and municipal regulatory bodies must make a commitment to streamlining the approval process while respecting the diverse interests involved.

It is essential to have a cohesive strategic plan for the zone and for the areas within the zone; it is essential for such plans to be adapted with clear commitment from the public and private sectors so that the private sector has a reasonable basis for investment in the tourism industry.

6

Tourism Industry Goals, Objectives and Concerns

6.0 TOURISM INDUSTRY GOALS, OBJECTIVES AND CONCERNS

Concomitantly with the resource and market inventory and analysis, an industry involvement program was conducted to gain an understanding of the goals, objectives and concerns of the area's tourism operators, municipal officials, planning boards and organized groups.

Throughout the program described below, information was acquired from briefs and discussions during public forums, from letters and reports issued by industry, government and associations' representatives, and from interviews with operators of tourism facilities and local residents.

6.1 Organization Of The Industry Involvement Program

The major components of the involvement program were:

Forums

Invitations to present briefs were sent to industry leaders, municipal government officials, planning boards, chambers of commerce, ratepayers' associations, environmental groups and other relevant organizations. They or their representatives were requested to outline their perception of the major problems facing tourism industry of the zone, and to make suggestions for resolving these issues and concerns.

Interviews

Prior to, during and after the industry forums, personal interviews were held with a significant number of individuals representing the tourism industry, municipal governments and other major interest groups. These interviews dealt more specifically with perceived issues, and recommendations for their resolution were explored more comprehensively than was possible during the forums.

Information Feedback

Information obtained from briefs and discussions during the forums, comments and suggestions made to the consultants by the representatives interviewed, and information received by letter from interested individuals during the course of the study, were summarized and distributed to all participants.

6.2 Tourism Industry Goals, Objectives and Concerns

The goals and concerns expressed by participants from the private and public sector were collated and analyzed, and four major categories emerged: research and planning, development and operation, training and promotion, and co-ordination.

Research and Planning

- a) More tourism industry and market-oriented research is required to enable private entrepreneurs, planning boards and municipal governments to keep abreast of trends in the travel market to maintain and increase the viability and vitality of the tourism industry.
- b) Growth of the tourism industry should be the result of a co-ordinated planning effort involving tourist operators, local communities and councils, residents and senior levels of government.
- c) Social and environmental considerations must form a major component in planning for the growth and development of the tourism industry.
- d) Governmental resource use and management agencies should recognize and incorporate the special requirements of the tourism industry in their planning and development programs or regulations.

Development and Operation

- a) The existing tourism plant should be upgraded, expanded and diversified.
- b) Developments that extend the tourist season into the shoulder or off-season should be emphasized to reduce the present reliance on a seasonal market.
- c) Developments should be clustered to allow for the creation of major destination areas.
- d) Additional tourist attractions or services to be developed or provided throughout the zone should include convention centres, major accommodation complexes, historical attractions, boat and boat-docking facilities, packaged tours, and other associated facilities in conjunction with the upgrading and expansion of existing tourism and leisure opportunities.
- e) There is a strong need for improved access to major attractions. An efficient transportation network that encourages tourism travel throughout the zone should be provided including sign installations, the upgrading and improvement of secondary highways to increase capacities during peak flows and the promotion of alternative modes of transportation such as rail and air. More emphasis on public transport is required to reduce industry vulnerability to future energy shortages.
- f) The natural and historical resources of the zone should be developed to increase the overall attraction of the zone but in a manner which is sensitive to environmental conservation and resource protection.
- g) Where the operation of tourism/leisure attractions generates additional demands for police, fire protection, garbage removal and other community services, programs should be

developed which distribute the responsibility for financing and providing these services equitably among the local, county and provincial governments and the industry operators involved.

- h) Development of the tourism industry's full potential is strongly dependent upon the improvements and expansion of municipal services, especially sewage and water systems.
- i) The capital required to develop tourism/leisure facilities and attractions should be more easily available through governmental assistance programs.

Training and Promotion

- a) There is a need to develop public educational programs which will make residents more aware of the value of the tourism industry to the economy of the region.
- b) Training programs should be established to increase the skills of both staff and management of tourism/leisure attractions.
- c) Promotional programs that "package" and promote shoulder and off-season use of existing facilities require greater support from the government and cooperation among operators.

Coordination

- a) The travel associations should be restructured to reflect the coordination and promotional requirements of different areas throughout the zone.
- b) A more effective system of communication among the members of the travel associations and various levels of government is required.

- c) All levels of government should coordinate the preparation and application of planning and development controls to minimize delays in the development of tourism/leisure attractions.
- d) The provincial government, especially the Ministry of Industry and Tourism, should take a much more active roll in the growth and development of the tourism industry of the area and provide more leadership in terms of research planning, development and promotional programs. The Ministry should act as a lobby group in order to encourage other government agencies to be more responsive to requirements of the tourism industry.

The major goals, objectives and concerns of the tourism industry throughout the area have been given serious consideration during the formulation of zone strategies. Where appropriate, the industry's objectives and interests are reflected in the planning principles and consequent recommendations for the growth and development of tourism.

6.3 Assessment Of The Tourism Industry and Implication For Tourism Development

This section is to present the consultant's assessment of the state of the tourism industry in the study area. It should be noted that the purpose of the critique is to highlight issues which require equal consideration with other factors in the formulation of a coherent strategy for tourism development. It is not the consultant's intention to be simply critical, but to underscore the problematic areas which have arisen principally from the historical context in which tourism developed in the area.

The historical fragmentary growth and lack of overall policy direction has contributed to what could be called "a crisis of understanding".

In the consultant's judgement, the industry lacks understanding of the competitiveness of the market for tourists, what the package of successful tourism development is, the linkages of the tourism industry to the urban and economic structures of the region, and the limitations of the social and environmental capacity of the area for tourism development. The lack of understanding is reflected in unrealistically high expectations for future development.

The industry lacks the tools for a sufficiently sophisticated market analysis to know its competitors, and to guide it in selecting particular market targets and reaching the selected markets. There is a tendency to rely on traditional and cost ineffective promotional methods. The industry is not equipped to meet current market demands for quality in facilities and services.

Generally, there is a lack of creativity in approach to producing and marketing tourism in prime markets.

In many instances, the level of management skills is insufficient. Part of the problem is related to the lifestyles of tourism operators for whom economic success is not of primary importance.

Through the course of the study and in the public forums, industry representatives were asked questions with both zone-wide and regional implications. In response, the industry representatives expressed mainly regionally-based viewpoints. These views were helpful in formulating strategies for regional areas, but the regional perspective limits the tourism industry from establishing complementary priorities and making co-operative and mutually beneficial decisions at the zone level. A detrimental and unproductive competitiveness is often the result. Co-ordination of non-competing activities into integrated packages (for example, bus tours and boat tours) are almost completely lacking.

The regional and local political climate in which tourism operates offers little consistent policy direction. Vocal political support needs to be transformed into commitment to established policies at the regional level to avoid subjecting the industry to local political vicissitudes. And conversely, the industry needs to develop leadership to present its case with a concerted voice to the Provincial, as well as to local and regional governments.

A contributing cause of the industry's precarious position in local politics is the lack of knowledge by both the community and industry about the industry's relationship and position in urban and economic structures. A clear understanding of the industry's contribution, costs and linkages to the community would serve as a base for establishing its priority in the growth and development plans for the particular jurisdiction. A successful tourism development package includes positive acceptance, good service and attractive urban design. The relationship between industry and community is one of inter-dependence, not independence.

If tourism is an important sector in the economy of a given community, then a commitment to tourism should be reflected in the apportionment of service and utilities infrastructure and other community resources backed with legal recognition in Official Plans. Conversely, tourism operators need to consider creating facilities and opportunities which cater to the local resident market as well as the tourist market.

A particular cause for concern by the consultant is the high expectation level expressed by the industry representatives towards the expansion of tourism in the area. The possibilities and constraints for tourism development have been inventoried and analyzed from Chapters two through six. It is important that the industry be given a realistic appraisal of its position so that expectation is within sight of potential. The Tourism Development Strategy is designed to meet the industry's potential.

7

Elements in the preparation of a Tourism Development Strategy

7.0 ELEMENTS IN THE PREPARATION OF A TOURISM DEVELOPMENT STRATEGY

7.1 Introduction

This chapter outlines the elements used to develop a tourism strategy for the Collingwood-Midland-Orillia Tourism Development Zone. Drawing upon the information and analyses of previous chapters, detailed assessment of the zone and its regions is presented. The framework, with guidelines, principles and definitions used in constructing development strategies are outlined to clarify the process through which five alternative strategies were formulated. The five alternative strategies are described and evaluated in the final sections of the chapter.

7.2 Tourism Development Regions based upon Resource Capability, Industry Expectations and Market Potential

A primary conclusion drawn from the resource analysis summarized in the preceding chapters is that the Collingwood-Midland-Orillia Tourism Development Zone is neither homogenous nor integrated. Resource potential, infrastructure development and present use patterns vary to such an extent throughout the Zone that the latter can be subdivided into rather distinct regions. The results of the industry involvement program supports this conclusion. The tourism industry considers the zone to be composed of discreet regions with recognizable identities and marketable images and has fostered this separation over the years through the development of competitive facilities and individual marketing programs.

Therefore, recognizing that the tourism development strategy will have to consider both the individual characteristics and requirements of these identifiable regions, and the need to provide a

co-ordinated, integrated approach to the growth of the Zone's tourism industry, a decision was made to take a two-pronged approach to the preparation of the tourism development strategy:

- a) First, to derive from the resource, market and industry analysis, a set of guidelines and principles that are applicable to the entire Zone and that will form a context within which the strategy can be developed;
- b) Second, to formalize the perceived regions and summarize their individual potentials and development requirements for incorporation into the tourism development strategy.

The resultant guidelines and principles are discussed in Section 7.4.2. The Tourism Development Regions, depicted on Drawing 3 were formalized using the following criteria:

- a) Definition of regions that are perceived by the Zone's tourism industry as having distinctive characteristics and identities;
- b) Delineation of the organizations and programs that have evolved within these regions to co-ordinate the development and promotion of the regions tourism and recreation facilities and attractions;
- c) Evaluation of present resource development patterns, use relationships and development potential within and near the perceived tourism development regions;
- d) Inclusion of all, or part of, appropriate landscape units containing relevant resource development and potential.

Fifteen Tourism Development Regions were identified as a result of the above process. As illustrated by Drawing 3, some "disputes" occurred as to what resources belonged in what regions.

Tourism Development Region (Locally Perceived)

Existing Industry Development (Existing, but not yet fully developed, or in development)

Desired Industry Development (Strong potential for future industry development)

Potential Industry Development (Potential for future industry development, but not yet fully developed, or in development)



Tourism Development Regions (Locally Perceived)

For example, the Town of Collingwood considered the Blue Mountain developments as falling within their region, yet the Blue Mountain Region did not specifically associate itself with the Town of Collingwood. The 30,000 islands area of the Georgian Bay is used by both Honey Harbour and Midland for outdoor recreation pursuits. Hence, it is considered to be an integral part of each region.

Using the information obtained from the resource, market and industry analysis, the present development, inherent capability and potential market attraction for a wide variety of tourism and recreation opportunities have been summarized. For each tourism and recreation opportunity, the Region was assessed:

- a) to determine the inherent resource capability for supporting that tourism and recreational opportunity;
- b) to identify the degree to which that capability has been developed by the tourism industry and for what market segments;
- c) to estimate the degree to which the tourism industry would like to develop and promote that tourism and recreation opportunity and for what market segments;
- d) to suggest the degree to which the resources (both developed and undeveloped) are actually capable of attracting the market segments desired in comparison with the characteristics and capabilities of other tourism and recreation developments located throughout Ontario and elsewhere.

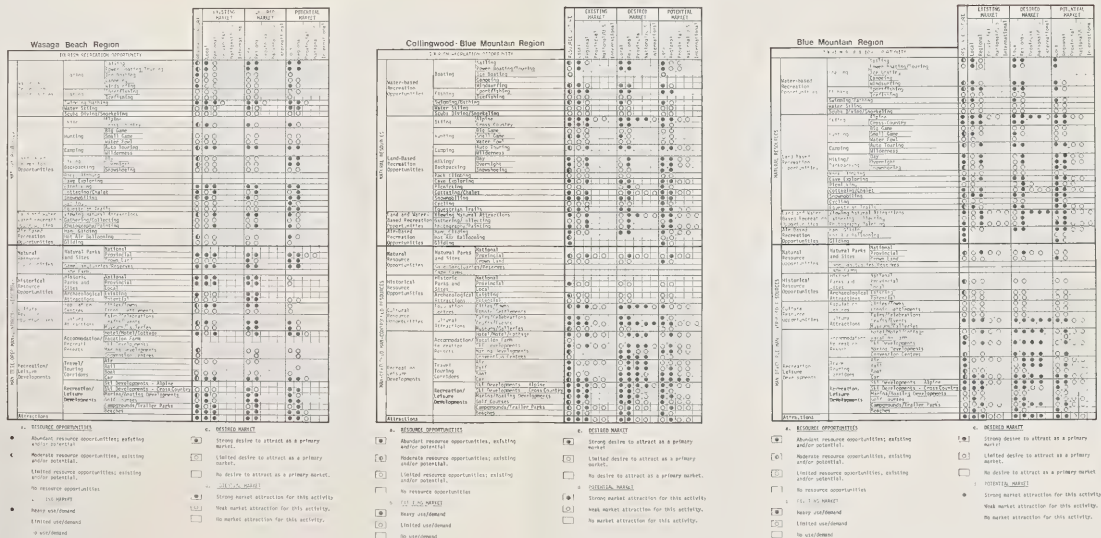
Figures 4 to 8, therefore, provide a comprehensive basis upon which the applicability and suitability of alternative tourism development strategies can be evaluated. First, they give a comprehensive overview of all potentials within the Tourism

Recreational Opportunities / Market Associations

[illegible]

Figure 4

Recreational Opportunities / Market Associations



Recreational Opportunities / Market Associations

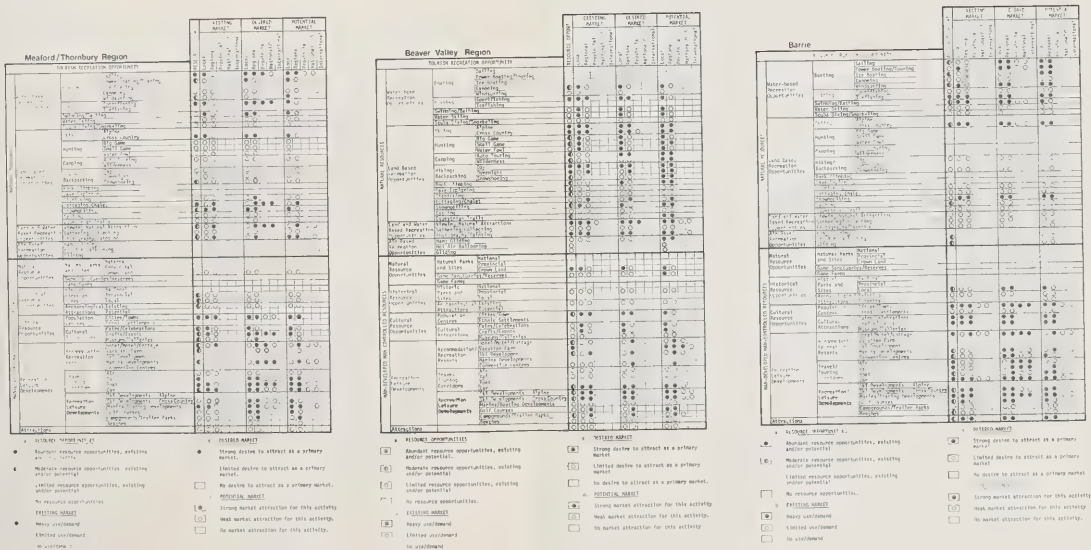


Figure 6

Recreational Opportunities / Market Associations

West Lake Simcoe Shoreline Region		Lakeshore Region		Lake Couchiching Region			
EXISTING MARKET		DESIRABLE MARKET		DESIRABLE MARKET			
<p>EXISTING MARKET</p> <p>Abundant resource opportunities, existing and/or potential</p> <p>Modest resource opportunities, existing and/or potential</p> <p>No resource opportunities</p> <p>EXISTING MARKET</p> <p>Many undeveloped</p> <p>Unlikely development</p> <p>No development</p>		<p>DESIRABLE MARKET</p> <p>Strong desire to attract as a primary market</p> <p>Limited desire to attract as a primary market</p> <p>No desire to attract as a primary market</p> <p>DESIRABLE MARKET</p> <p>Strong market attraction for this activity</p> <p>Modest market attraction for this activity</p> <p>No market attraction for this activity</p>		<p>DESIRABLE MARKET</p> <p>Abundant resource opportunities, existing and/or potential</p> <p>Modest resource opportunities, existing and/or potential</p> <p>No resource opportunities</p> <p>DESIRABLE MARKET</p> <p>Many undeveloped</p> <p>Unlikely development</p> <p>No development</p>		<p>DESIRABLE MARKET</p> <p>Strong desire to attract as a primary market</p> <p>Limited desire to attract as a primary market</p> <p>No desire to attract as a primary market</p> <p>DESIRABLE MARKET</p> <p>Strong market attraction for this activity</p> <p>Modest market attraction for this activity</p> <p>No market attraction for this activity</p>	

Figure 7

Recreational Opportunities / Market Associations

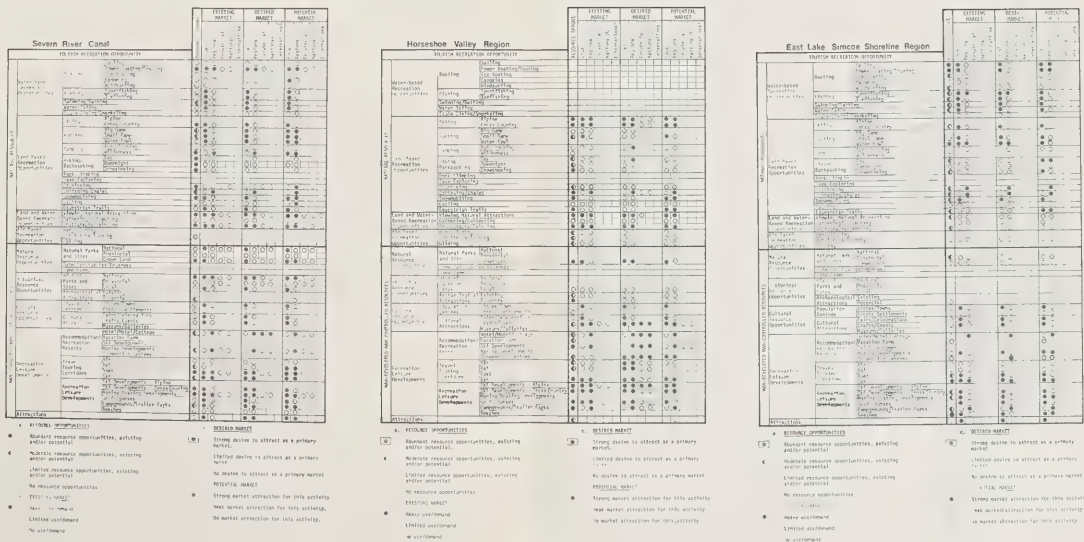


Figure 8

Development Regions. Second, because it is imperative that the tourism development strategy and the related development opportunities reflect reality imposed by resource capability, market potential and social sensitivities, and are not based on unsupported, optimistic expectations, the Figures are so constructed that the desires expressed by the tourism industry can be easily compared with resource capability and market potential. As a result, expectations are tempered with reality.

7.3 Definition Of A Tourism Development Strategy

A tourism development strategy is a statement of broad goals, objectives and policies outlining a general course of action for the growth and development of the tourism industry leading towards the establishment of priorities for resource development, program formulation and management procedures. It reflects the objectives of both governments and the private sector, is sufficiently broad in scope and flexible in approach to accommodate existing conditions, is responsive to a wide variety of short and long-term specialty markets and resource development opportunities, and is cognizant of local community aspirations and initiatives.

7.4 Framework For The Preparation Of A Tourism Development Strategy

7.4.1 Planning Approach

The process used for the preparation of the tourism development strategy and the area development strategies for the Collingwood-Midland-Orillia Tourism Development Zone is illustrated in Figure 9. Specifically the steps in this planning process were:

- a) the identification of specific goals and objectives to be addressed by the tourism development strategy;
- b) the establishment of guidelines and principles which define more clearly the acceptability of possible courses of action;

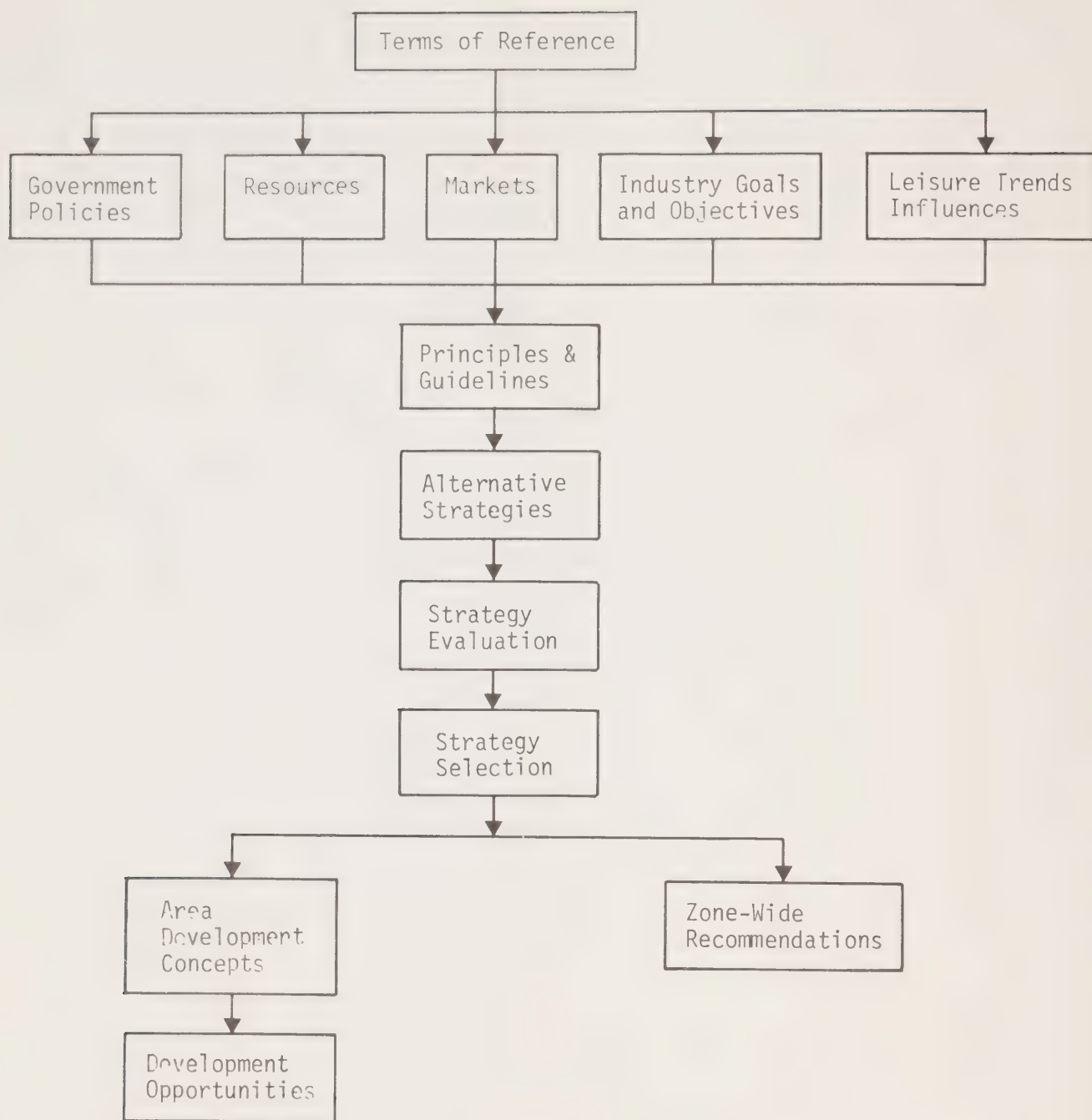


Figure 9
Framework for
Preparation of Tourism Development Strategy
and Area Development Concepts

- c) within the context of the guidelines and principles, the identification of alternative approaches for satisfying the goals and objectives set for the study;
- d) the evaluation and selection of a Zone Strategy for tourism development;
- e) the definition of area development strategies and associated development opportunities;
- f) the establishment of general development guidelines and zone-wide recommendations.

7.4.2 Guidelines and Principles

Derived from the study objectives, from resource inventories and analysis, from consultations with the private sector and from discussions with specialists and government officials, the following set of guidelines and principles have guided the formulation of alternative strategies for the growth of the tourism industry of the Collingwood-Midland-Orillia Tourism Development Zone.

Planning

- a) Although the tourism industry is dependent upon the availability of recreational facilities and attractions, the primary purpose of this study is not just to identify opportunities for recreational developments. Instead, the intent of the study is to recommend a strategy for the growth and development of the tourism industry of the Collingwood-Midland-Orillia Zone through the identifications of tourism developments and programs required to match plant capability with resource potential and market demands.
- b) The Tourism Development Strategy resulting from this study is to be a zone-wide strategy. Hence the health of the tourism industry as a whole will take precedence over specific local demands.

- c) No consideration will be given to a major alteration of the Zone's configuration as established by the report Tourism Development in Ontario: A Framework for Opportunity (1976).
- d) The Tourism Development Strategy will recognize the roles and responsibilities of both the public and private sectors in its recommendation outlining development opportunities, but specific measures for implementing the recommendations are to be the subject of discussions and negotiations between the private sector and senior levels of government. Hence, the strategy will not incorporate programs and measures for implementing its recommendations.
- e) The Tourism Development Strategy is intended to outline for private sector consideration and financial investment a co-ordinated system of tourism development opportunities. Hence, the strategy may not and is not intended to reflect existing government policy, nor can it be construed as being a policy framework that will reflect future government action.
- f) The Zone's Tourism Development Strategy must recognize the need and build in the potential for a future integration with a Provincial Tourism Strategy.
- g) The Tourism Development Strategy will reflect a sensitivity to the expectations and attitudes of local residents toward tourism and tourism developments. Through the consideration of social carrying capacity exhibited by different areas, the Strategy will minimize the unwanted disruption of traditional lifestyles.
- h) The type, character and market attraction of intervening opportunities, or tourism development proposed for other zones throughout the province, competing for the same

markets, will receive serious consideration during the preparation of a Tourism Development Strategy for the Collingwood-Midland-Orillia Zone.

- i) The long-range effect and geographical impact of societal trends and influences and their implications for the tourism industry are to be reflected in the range and character of development opportunities recommended by the Tourism Development Strategy.
- j) The Tourism Development Strategy will be based upon the assumption that the importance of the tourism industry to the economy of the zone is recognized by other resource use, management or regulatory agencies, and that these agencies will incorporate the requirements of the Zone's tourism industry into their various resource use policies, plans, and programs.
- k) The Tourism Development Strategy will be based upon the assumption that all planning for the tourism industry will be done on a long-term basis, at least a 20-year horizon, with short-term reviews assessing the strategy's continued suitability to local, regional and provincial requirements.
- l) The Tourism Development Strategy will recognize the need to have its recommendations and development proposals reflect the plans of the local levels of government to generate support for their implementation on an integrated, rather than a piecemeal basis.
- m) The Strategy will be aware of the conditions and constraints imposed by the existing land-use control structure but does not consider itself bound by them. When deemed necessary for the benefit of the tourism industry, the Strategy's proposals and recommendations will exceed the boundaries established by existing planning and land-use controls.

- n) The Tourism Development Strategy will recognize that the Collingwood-Midland-Orillia area is a recreation "suburb" of Toronto.

Development

- a) The Tourism Development Strategy will, wherever feasible, stress nodal developments providing a variety of primary and associated tourism and recreation opportunities.
- b) The Strategy will also stress the need to provide a certain density of facilities and programs in particular locations to establish a "critical mass" beyond which the development of an identity and the creation of an awareness in the target market segments of the Zone's tourism and recreation opportunities become feasible.
- c) Nodal developments will be encouraged because they minimize direct impact upon the zone's significant tourism and recreation resources.
- d) The Tourism Development Strategy will emphasize the development and use of high quality resources. Hence, development of marginal natural, historical or cultural resources will only be recommended if necessary to support the development and use of major nodal attraction.
- e) Similarly, the Tourism Development Strategy will recommend the upgrading of the existing tourism plant only where that plant meets or has the potential for meeting market expectations. Conversely, the strategy will not necessarily support existing facilities or attractions that are not providing and cannot provide the sophisticated requirements of the target market segments.
- f) The Development Strategy will strive to associate the facilities, attractions, services and programs proposed for each major development node with one or more major themes,

giving it a distinguishable identity which is different than those of other proposed development nodes. Such an identity will facilitate market segmentation, allocation and promotion.

- g) Where warranted, the Tourism Development Strategy will endeavour to increase the competitive position of the Zone's tourism industry, by the provision of additional types of tourism, recreation and entertainment facilities.
- h) Mass modes of public access to the tourism attractions of the Zone from nearby market concentrations are to be explored and, where feasible, emphasized to lessen the impact of future, energy-related, travel dislocations.
- i) The Strategy will explore and make recommendations on public and private co-operation in the development and use of crown lands, and the integration of these developments and programs with private establishments.

Marketing

- a) The Tourism Development Strategy will focus on increasing the industry's penetration of the Zone's traditional markets supported by specialty markets.
- b) The Tourism Development Strategy recognizes and classifies the existing strong cottage/second home market as a local or day-use market. The patterns of behaviour exhibited by this market with respect to the use of retail, commercial and recreation facilities are sufficiently similar to those of the local residents to warrant such a classification from a strategic planning perspective.
- c) Through a variety of avenues, including cluster developments, theme associations, unique attractions, special events, market segmentation and well directed promotional efforts, the Tourism Development Strategy will seek to stimulate the development of strong market identities.

- d) Even though the Tourism Development Strategy will focus on the Zone's traditional markets, it will be future rather than status-quo oriented, will provide better and broader recreational experiences and will incorporate a sensitivity to, and a flexibility for accommodating shifts in the type and quality of activities, attractions and services demanded by these and specialty markets.
- e) To ensure a continual commitment and use by the traditional Ontario-Metro-Toronto markets of the Zone's tourism and recreation facilities, the Tourism Development Strategy will strive to foster an increase in second home ownership or shared right-to-use schemes. Similarly, the Strategy will encourage the development of a strong effort to retain existing United States markets (primarily second home owners/cottages and their visitors) through the development of a more competitive plant, the promotion of packaged tours and the evaluation and possible modification of government land-use regulations controlling the ownership of second homes/cottages by foreign interests.
- g) Extensive pressures for the use of day-use recreation facilities are generated by both the local residents and regional markets. The Tourism Development Strategy will recognize these potential use conflicts and strive to reduce competition through facility location, development and programming.

7.4.3 Tourism And Tourism Development Definitions

A system is defined as a set of connected parts organized into a complex whole. A systems orientation, then, can be described as a way of looking at a system and defining not only the individual parts that are contained therein, but also their relationships, and organizing them into successive levels of comprehensiveness and complexity. Hence, each part can be described both in the specific function it performs, and the role it plays with respect

to other parts within the system. When so described, the impact of any change made to the system can be more easily traced and understood.

The preparation of a tourism development strategy is actually an exercise in systems development. It organizes a multitude of tourism and recreation facilities, services and programs into a proposed system that will stimulate the growth of the tourism industry in an orderly, integrated manner. For the purposes of this study, the basic parts that will assist in the creation of a system for tourism development in the Collingwood-Midland-Orillia Tourism Development Zone are defined below.

The definitions have other advantages. They also inform the reader of the meaning of terms or phrases used to describe tourism development and programs and reduce the need to re-iterate the type and character of facilities and services that are found in association with each other in identified tourism developments.

- a) The following definitions are important for understanding the tourism development strategy in particular for areas within the Zone.

Four Season Tourism Destination Area

A distinct geographic area containing an integrated network of tourism destination resorts and supporting tourism developments offering a wide range of facilities, attractions, activities and events on a year round basis, reflecting through either the developments or programs the area's dominant, historic and natural themes. Accessible by major transportation modes along several travel corridors, the area attracts a broad range of international, provincial and/or regional market segments. An example of a Four Season Tourism Destination Area in the zone is the Blue Mountain area.

In a four-season tourism destination area, the tourism industry is the primary employer and the major source of income for the residents of the area, and there is a strong commitment by the local residents and the relevant municipal governments to stimulate the growth and development of the tourism industry.

Tourism Destination Area

A distinct geographic area containing one or more tourism destination resorts integrated into a network of supporting facilities, attractions and events reflecting through developments and programs, one or more of the area's dominant historic or natural themes. The developments and programs may be oriented to one or more major seasons and may attract a broad range of market segments depending upon the quality and quantity of tourism amenities available. Midland-Penetanguishene and Beaver Valley are examples of Tourism Destination areas.

Tourism Destination Resorts

An establishment offering in one complex, under single management, a reasonable range of man-made and/or natural recreational amenities and facilities support by accommodation, food and beverage services.

- a) Summer Resorts: Water or land oriented facility complexes providing natural and/or man-made recreational amenities and activities for overnight or long-stay visitors during the summer, with possible extensions into spring and fall shoulder seasons. Fern Resort on Lake Couchiching is an example in the Zone.

- b) Winter Resorts: Primarily a land-oriented facility complex offering a variety of natural or man-made recreational amenities and activities for over-night or long-stay visitors during the winter season. Horseshoe Valley is an example in the Zone.
- c) Year-Round Resorts: Water and land-oriented facility complex offering a wide variety of natural or man/made recreational amenities and activities for over-night and long-stay visitors during the entire year. Blue Mountain Resort is an example in the area.

Outdoor Recreation Area

A large tract of land with a broad range of landforms, water features and vegetation associations whose primary management purpose is to provide opportunities for extensive land and water-based recreation for the public and the clientele of commercial outdoor recreation outfitters. Honey Harbour and the Tiny Shoreline are examples in the area.

Facility

An establishment whose primary purpose is to offer a particular service or recreation activity opportunity to the tourist. Services may include accommodation, food, beverage or automotive services, while recreation activity opportunities can range from ski development to tennis courts, from a marina to an information centre.

Attraction

A physical feature of interest or significance which can either be natural (falls) or man-made (factory). There may or may not be facilities constructed to enable fuller enjoyment by visitors. The attraction can be of international, national, provincial, regional or local significance depending upon degree of market attraction.

Event

A transitory man-made occurrence, celebration or activity of considerable interest and notability that is usually (but not always) held on an annual basis, e.g., rodeo, folk festivals, ski races. They can be of international, national, provincial, regional or local significance depending on the markets that are attracted.

Recreational Waterway

A river-lake-canal corridor having a high capability for various types of motorized and non-motorized boating and associated recreational activities.

Historic Waterway

A river-lake-canal corridor that played a significant role in the exploration, trade and settlement of the province, is navigable by non-motorized and/or motorized pleasure craft and has inherent capability for history interpretation and associated recreational activities. The Severn River is an example of both an Historic and Recreational Waterway in the Zone.

Scenic/Historic Route

A paved or unpaved route or trail that brings the traveller into contact with landscapes, natural features, historic sites or monuments of significance to the heritage of the province or the region. Beaver Valley and the route from Port Severn to Big Chute are examples of Scenic/Historic Routes in the Zone.

- b) Service Centres, Travel Corridors and Gateways are designated in a hierarchical system according to location and/or the range of services and facilities provided.

Provincial Service Centre

A community offering a complete range of services to the tourist including a variety of types and qualities of accommodation facilities, food and beverage facilities, grocery and other retail facilities, gasoline and automobile service facilities, banking facilities, a Regional Tourism Information Centre and other related facilities.

Regional Service Centre

A community offering many services to the tourist but with a somewhat limited variety of types and qualities of accommodation facilities, food and beverage facilities, grocery and other retail facilities, gasoline and automobile service facilities, banking facilities, a Regional Tourism Information Centre and other related facilities.

Local Service Centre

A community offering a limited range of essential services to the tourist including accommodation facilities, food and beverage facilities, grocery and other retail facilities, gasoline and automobile service facilities, banking facilities, a local Information Centre and other related facilities.

Provincial Travel Corridor

A well-travelled, distinct linear route linking international or provincial gateways with provincial or regional service centres and tourism destination areas.

Regional Travel Corridor

A paved or unpaved route linking natural or historic attractions with local or regional service centres.

International Gateway

A population centre where overseas tourists enter Canada to commence their visit. Such a gateway offers either an international airport or port facility, a complete range of tourism services and accommodation, and has access via a variety of transportation modes and corridors to all part of the province.

Provincial Gateway

A population centre where Canadian or U.S. visitors enter the province to commence their visit. Such a gateway allows entry by air, ship, rail or major highway, offers a broad range of tourism services and accommodations, and has access via a variety of travel modes and corridors to all part of the province.

Regional Gateway

A population centre on a provincial or regional travel corridor where tourists commence their visit to a region. Such a gateway allows entry by air, rail, port or highway, offers a considerable range of tourism services and accommodation, and has access via several travel modes and routes to most of the region.

c) Parks

National Park

Part of a system of outstanding and representative natural areas of Canadian significance administered by Parks Canada. The purpose is to provide opportunities for public understanding, appreciation and enjoyment of the natural heritage so as to leave it unimpaired for future generations.

Provincial Park

Part of a system of outstanding and representative natural areas with a high recreational capability of national, provincial and regional significance administered by the Ministry of Natural Resources, Provincial Parks Branch. There is a classification system of six types whereby parks are managed for various intensities of recreational use on a continuous basis ranging from those primarily intended for intensive public recreational use to those that are primarily intended for preservation of undeveloped natural systems and low intensity recreation.

Historic Park

An area containing outstanding heritage resources associated with persons, places and events of historic significance. Means are developed to enable public understanding, appreciation and enjoyment in a manner that leaves the resources unimpaired for future generations. These parks can be administered by the province or Parks Canada.

Wilderness Parks or Conservancies/Reserves/Nature Conservancies

A pristine roadless tract in which natural processes and ecological communities are preserved. Extensive, low impact recreational uses are permitted, however, no exploitation or development is permitted except as may be necessary for the preservation of natural processes.

7.5 Alternative Tourism Development Strategies For The Zone

Using the principles and guidelines outlined in Section 7.4.2 as parameters and the tourism development definitions as building blocks, five alternative strategies were formulated. Figure 10 compares their primary characteristics.

7.5.1 Description of Alternative Zone Strategies

STRATEGY 1

To stimulate short-term (overnight/week-end) and extended (3 or more days) visitation on a year-round basis by international, provincial and regional (also regional U.S.) market segments through the development of an integrated network of tourism destination resorts and complementary tourism developments offering a wide range of facilities, attractions, activities and events throughout the year, and developed on a nodal concept basis by the private sector with strong government leadership and financial support.

As illustrated by Figure 10, Strategy 1 places a strong emphasis upon the provisions of a wide range of facilities, services and programs of sufficient quality to be able to compete on a provincial basis for the vacation, package, specialty and overnight markets. It's intent is to develop an identity for the zone as an excellent place to spend a mini or full vacation during any time of the year.

Application and realization of Strategy 1, therefore, requires not only the existence of high quality resources and the development of a sophisticated tourism plant, but also full co-ordination and co-operation by both the public and private sectors throughout all of the phases of strategy implementation.

STRATEGY 2

To stimulate day-use and short-term (overnight/week-end) visitation on an extended seasonal basis by regional (regional U.S.) and local market segments through the development of an integrated network of one or more tourism destination resorts and/or complementary tourism developments offering a range of facilities, attractions, activities and events, and developed on a nodal concept basis by the private section with strong government leadership in the areas of research, planning, development approvals and promotion.

Comparison of Alternative Tourism Development Strategies

- Primary Emphasis
- Secondary Emphasis
- No Emphasis
- Leadership/Proactive Role
- Reactive Role
- Minimal Role

PRIMARY CHARACTERISTICS OF ALTERNATIVE STRATEGIES																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																					
ALTERNATIVE STRATEGY	Length of Stay				Target Market						Type of Developments														Development Approach			Pattern			Relationship		Role of Government																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				
	Longer Than a Week	Three to Six Days	Overnight/Weekend	One Day or Less	International	Rest of United States	Canada	Provincial	Regional/Regional U.S.	Local	Four Season Tourist Destination Area	Tourist Destination Area	Destination Resort	Outdoor Recreation Area	Recreation Facilities	Natural Attractions	Historical Attractions	Cultural Attractions/Events	Man-Made Attractions	Tours/Routes	Accommodation	Food/Beverage	Services/Utility Systems	Upgrade	Expand	Construct	Modal	Non-Modal	Corridor	Integrated/Coordinated	Non-Integrated/Uncoordinated																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																						
1	○	●	●	○	•	•	○	●	●	○	●	•	●	○	●	●	●	●	●	●	●	●	●	●	○	○	●	●	●	●	•	●	●	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	

Figure 10

Whereas Strategy 1 focuses primarily on extended stay visitors, Strategy 2 emphasizes the attractions and retention of overnight and week-end visitors. Hence it recognizes the traditional market strengths of the Metro-Toronto and Kitchener-London areas, and to a lesser degree the major urban centres on the Canadian-United States border such as Detroit and Buffalo. As such, it is not as demanding as Strategy 1 as to the absolute range, type and quality of tourism and recreational facilities required to attract the target markets.

Under Strategy 2, the private sector is totally responsible for putting the facilities, services and programs in place, but it can count on active support by the relevant government agencies in determining the feasibility of the proposal, in facilitating their implementation and in promoting the products. Financial assistance may occur, but only on a case by case basis, not through a general financial assistance program.

STRATEGY 3

To stimulate day-use visitation on a year-round basis by regional and local market segments through an upgrading and expansion of existing day-use facilities and attractions and a further development of the Zone's natural, historical, cultural and other attractions, developed on a non-integrated non-nodal concept basis by both the public and private sectors.

The basic difference between Strategy 3 and the two previous strategies are threefold. First, it is oriented towards the provision of a diversity of day-use recreational facilities and attractions for use by local residents and regional markets and has no direct interest in increasing the accommodation component of the tourism industry. Second, Strategy 3 recommends the development of day-use recreation facilities in locations where resource potential permits, where supporting services exist or are easily installed and/or where such developments fit in with the objectives and

plans of the local government. Development may, therefore, occur on either a dispersed or nodal fashion, with little or no integration of services and programs and with great potential for either competing with or complementing each other. Third, the public sector can adopt a distinctly dual role. It may consider the provision of particular types of day-use facilities as their primary responsibility, leaving the private sector with the responsibility for providing other types of resource specific or resource non-specific day-use recreation activities. In addition, the public sector may play an active role in assisting the private sector in fulfilling its responsibilities.

STRATEGY 4

To stimulate day-use, short-term and extended visitation on a seasonal or year-round basis by all market segments through the development of a wide diversity of tourism destination resorts, facilities, attractions and events, and developed by the private sector on a non-integrated non-nodal basis with government providing integrated, reactive support to meet individual development objectives.

A highly competitive approach to the growth and development of the tourism industry in the Zone, Strategy 4 places the burden for planning, development and marketing strictly upon the shoulders of the private sector. It permits the development of whatever tourism and recreation facilities, services and programs for whatever markets proposed by the developer of tourist operations so long as these proposals abide by the planning and development requirements of the local levels of government. Inter-zonal co-ordination and co-operation in development, management and marketing efforts remain the sole responsibility of the private sector and will occur to the degree desired by the tourism industry. The role of the public sector is restricted to the provision of expert advice and assistance when so requested by the private sector.

STRATEGY 5

To allow for a limited increase in visitation of the Zone's present market segments compatible with the "conserver" orientation and lifestyles of the Zone's residents through a limited upgrading and expansion of existing tourism destination resorts, facilities and attractions, and the development of significant natural, historical and cultural resources, developed on a non-integrated, nodal concept basis by the private sector within the existing policies and programs of local, regional, provincial and federal governments.

Strategy 5 emphasizes strict control over all tourism and recreation developments to ensure retention of resources quality or integrity, to prevent resource degradation or misuse and to protect the quality of life of the residents of the area. It is essentially a "conserver" oriented strategy that permits the development of only those additional tourism and recreation facilities that recognize the capacity and tolerances of the resources within the Zone and that reflect the expectations of the local residents.

7.5.2 Evaluation of Alternative Zone Strategies

The information presented in Section 7.2 for each of the Tourism Development Regions is organized into three categories; existing conditions and use patterns, desired developments and markets, and actual resource and market potential. These categories were used to determine the strategy that best reflected the requirements of each Tourism Development Region and the Zone as a whole. Specifically for each Region three strategies were identified that, respectively,

- a) best fitted the existing developments and use patterns;
- b) best reflected the developing and marketing goals of the local municipalities and the tourism industry; and that
- c) best recognized the Region's tourism and recreation development and marketing potential.

Figure 11 and Drawing 3 illustrate the results of the above matching process, and a basic conclusion can be drawn from the results. Even though the requirements and potentials of each Tourism Development Region can be met by a particular strategy, none of the proposed alternative development strategies, as stated, can be applied to the entire Collingwood-Midland-Orillia Tourism Zone.

The decision was, therefore, made to adopt a more flexible, multi-directional approach to the problem and develop a tourism development strategy that would permit the application of any one of the five initial strategies to any area within the Zone. To prevent fragmentation of the Zone, and to ensure a co-ordinated systems approach to the growth and development of the tourism industry as a whole, the selection and application of the appropriate alternative strategy are to occur in the context of the goals, objectives and principles established previously in this report.

FIGURE 11

EVALUATION OF ALTERNATIVE ZONE STRATEGIES AGAINST
REQUIREMENTS OF TOURISM DEVELOPMENT REGIONS

<u>Tourism Development Regions</u>	<u>Strategy Reflecting Existing Developments & Use Patterns</u>	<u>Strategy Reflecting Desired Developments & Markets</u>	<u>Strategy Reflecting Resource & Market Potential</u>
Honey Harbour Region	3	5	5
Midland-Penetanguishene Region	3	4	2
Tiny Shoreline Region	3	5	5
Wasaga Beach Region	2,3	2,3	2,3
Collingwood-Blue Mountain Region	2	1	1
Blue Mountain Region	2,3	1	1
Meaford-Thornbury Region	2	3	1
Barrie	2,3	4	3,2
West Lake Simcoe Shoreline	3	5	5
Orillia	2,3	4	3,2
Lake Couchiching Region	3	5	5
Severn River Region	3	5	3
Horseshoe Valley Region	3	2	2,3
East Lake Simcoe Shoreline	3	5	5
Beaver Valley	3	5	2

8

Tourism Development Strategy

8.0 TOURISM DEVELOPMENT STRATEGY

8.1 Introduction

There are basic reasons why a tourism development strategy is required for the Collingwood-Midland-Orillia Zone. First, it will enable the industry to indicate its long range goals and objectives, identify the programs required to reach these objectives and define the resources and support activities required from the various levels of government. In so doing, the industry will be placed in a much better position for obtaining the required recognition, resources and government support. Second, the tourism development strategy will provide the industry with a means for integrating its own activities, and enhance its capability to set zone-wide and area specific priorities, allocate its resources accordingly and monitor the effectiveness of its actions.

Realization of a tourism development strategy, even with strong support from the private sector, will require the full commitment of all levels of government. Acknowledgement of the importance of the tourism industry and government leadership in integrating the objectives and requirements of the tourism industry with those of other resource use and management agencies are considered priority items.

8.2 Tourism Development Strategy

The Tourism Development Strategy for the Collingwood-Midland-Orillia Tourism Development Zone is:

To recognize the diversity of the Zone's resource characteristics and development potential; the variations in the goals and objectives of different sectors of the tourism industry; the wide range of lifestyles and expectations of the Zone's residents; private sector development proposals; and future tourism and leisure trends through the application of different tourism development strategies as area development strategies on a nodal and corridor basis throughout the Zone.

The intent of the Tourism Development Strategy is realized through the application of the following Area Development strategies:

Area Development Strategy 1:

Four-Season Tourism Destination Area.

To stimulate short-term (overnight/week-end) and extended (3 or more days) visitation on a year-round basis by provincial and regional (regional U.S.) market segments through the development of an integrated network of tourism destination resorts and complementary tourism developments offering a wide range of facilities, attractions, activities and events throughout the year, and developed on a nodal concept basis by the private sector.

Area Development Strategy 2:

Extended Season Tourism Destination Area

To stimulate day-use and short-term visitation (overnight/week-end) on an extended seasonal basis by regional (regional U.S.) and local market segments through the development of an integrated network of one or more tourism destination resorts and/or complementary tourism developments offering a range of facilities, attractions, activities, and events, and developed on a nodal concept basis by the private sector.

Area Development Strategy 3:

Day-use Destination Area

To stimulate day-use visitation on a year-round basis by regional and local market segments through an upgrading and expansion of existing day-use facilities and attractions and a further development of the area's natural, historical, cultural and other attractions developed on a non-integrated, non-nodal concept basis by both the public and private sectors.

Area Development Strategy 4:

All Seasons, All Markets

To stimulate day-use, short-term and extended visitation on a seasonal or year-round basis by all market segments through the development of a wide diversity of tourism destination resorts, facilities, attractions and events, and developed by the private sector on a non-integrated, non-nodal basis.

Area Development Strategy 5:

"Conserver Society"

To allow for a limited increase in visitation of the area's present market segments compatible with the "conserver" orientation and lifestyles of the area's residents through a limited upgrading and expansion of existing tourism destination resorts, facilities and attractions, and the development of significant natural, historical and cultural resources, developed on a non-integrated, nodal concept basis by the private sector.

Government support programs, whether they be technical, financial or otherwise will be generally applicable over the entire zone, but their specific implementation will be tailored to meet the specific requirements and problems of each area.

8.3

Definition of The Tourism Development Areas

Keys to the planning of a zone for tourism are the following factors: natural and cultural resources, nearness to markets and size of markets, transportation and access, infrastructure, the reputation of existing destinations, and the design, construction, and management of land development. Organization and evaluation of the above data and the resultant recommendations usually occur on the basis of some type of land-use or land planning unit. Tourism Development areas play that role during the present study.

The Tourism Development Regions described in Chapter 7, Section 7.2, served to organize and summarize the salient characteristics of resource capability, market potential and industry requirements. Delineated primarily on the basis of the tourism industry's perception of discrete regions with recognizable identities, the boundaries of the Regions do not adequately reflect all of the following considerations to serve as planning units.

- a) the resource potential of each landscape unit and its geographic relationship with population concentrations and markets;

- b) transportation systems and accessibility of resources;
- c) existing service area (a city or other collection of services including health protection and care, police protection, public services, businesses);
- d) developed attractions that are already attracting visitors and have established reputations as destinations;
- e) goals and development aspirations of local municipal governments, special interest groups and local residents.

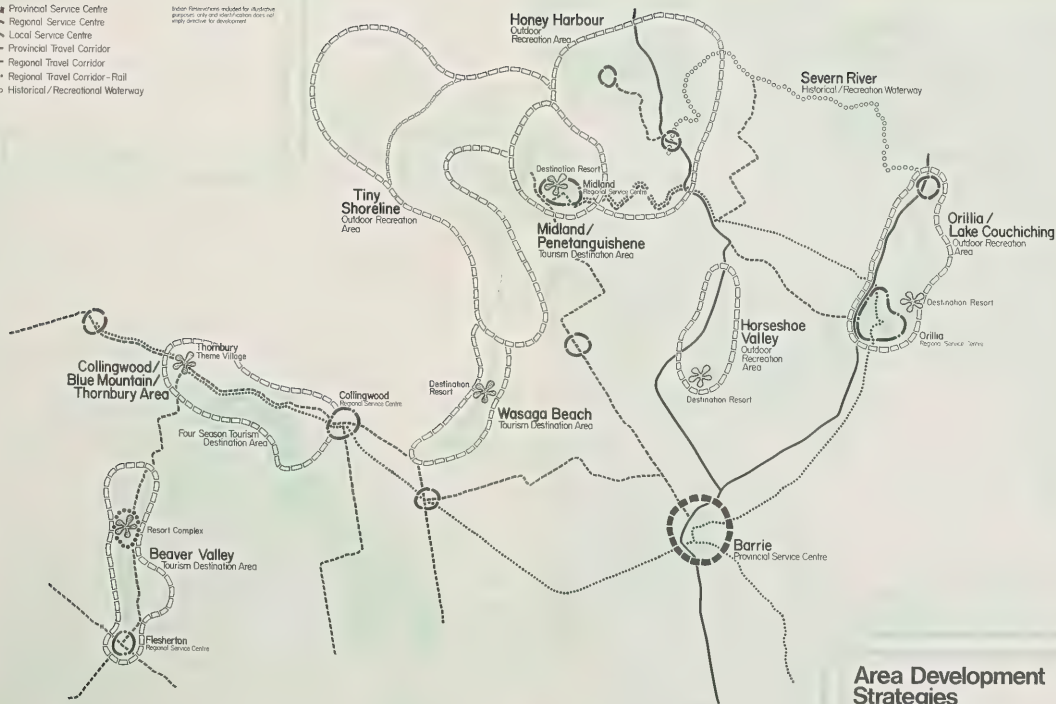
A combination of the above considerations has resulted in a redefinition of the fifteen original Tourism Development Regions into 11 specific planning units known as Tourism Development Areas, and in an assignment to each area an Area Development Strategy that met most, if not all, of the area's requirements. These 11 units form the context within which the specific characteristics of the Tourism Development Strategy for the Collingwood-Midland-Orillia Tourism Development Zone are described.

The Tourism Development Areas and their associated Area Development Strategies are identified in Figure 12 and in Drawing 4.

The following sections describe for each development area: its designation; the recommended development strategy; the development intent for the area; the associated development opportunities; and the facilities, attractions, services and programs recommended.

-  Provincial Service Centre
-  Regional Service Centre
-  Local Service Centre
-  Provincial Travel Corridor
-  Regional Travel Corridor
-  Regional Travel Corridor - Rail
-  Historical/Recreational Waterway

Indian Reserves are excluded for development purposes. Note and identification does not imply direction for development



**Area Development
Strategies**

FIGURE 12

TOURISM DEVELOPMENT AREAS AND ASSOCIATED
AREA DEVELOPMENT STRATEGIES

Areas Assigned Area Development Strategy 1

Area 7 Blue Mountain Four Season Tourism Destination Area

Areas Assigned Area Development Strategy 2

Area 2 Midland-Penetanguishene Tourism Destination Area

Area 6 Wasaga Beach Tourism Destination Area

Area 9 Beaver Valley Tourism Destination Area

Areas Assigned Area Development Strategy 3

Area 3 Severn River Historic/Recreational Waterway

Area 8 Thornbury Theme Village

Area 10 Horseshoe Valley Outdoor Recreation Area

Area 11 Historic Steam Train Tourist Attraction

Areas Assigned Area Development Strategy 4

No area has been assigned area development strategy 4

Areas Assigned Area Development Strategy 5

Area 1 Honey Harbour Outdoor Recreation Area

Area 4 Orillia-Lake Couchiching Outdoor Recreation Area

Area 5 Tiny-Shoreline Outdoor Recreation Area.

8.3.1 Area 1. Honey Harbour Outdoor Recreation Area

The Honey Harbour Area is characterized by a myriad of islands, boat passages, lakes and rivers and is ideally suited for a variety of extensive forms of recreation. Because of these resource characteristics and capabilities, past recreational developments have taken two forms; land-based support facilities for commercial and private boat cruises, and second-home residential developments capitalizing on the water oriented recreation potential.

Therefore, in order to reflect resource capability and existing levels of recreational development and use, the Honey Harbour area has been designated as an Outdoor Recreation Area in which proposed tourism and recreation developments, services and programming should be compatible with the following area development strategy:

To allow for a limited increase in visitations of the area's present market segments compatible with the "conserver" orientation and lifestyles of the area's residents through a limited upgrading and expansion of existing tourism destination resorts, facilities and attractions, and the development of significant natural historical and cultural resources, developed on a non-integrated nodal concept basis by the private sector.

a) Area Development Intent

The development intent for a Honey Harbour Outdoor Recreation Area is to complement and accentuate the provision of land-based attractions, recreational developments and support facilities for short and extended commercial and private pleasure cruises and other water-oriented recreational activity of a commercial nature. Developments and facilities should include: centrally located, full-service marinas; marine parks providing both day-use recreation facilities and/or protected harbours for overnight anchorage; identified, interpreted significant natural and cultural

attractions; remote campsites or furnished cabins for short-term rental; boat and boating guides; emergency service network and all other services and programs that would be required to support extensive commercial and pleasure boat cruising activities.

To a limited extent, and controlled by careful, precise design and location parameters, the development of second homes and cottages should also be encouraged.

b) Development Opportunities

The routes outlined on Drawing 11 (following page 167) are symbolic only and do not represent the precise location of each leg of the cruise. These can only be established after a careful detailed evaluation of the entire 30,000 island area and applicable rules and regulations promulgated under the various provincial and federal acts regulating small crafts, route identification and harbour installations. Local knowledge and expertise must form the basis for this evaluation and subsequent finalization of routes for day and extended cruises by power boats, sailboats and canoes.

Similarly, the development opportunities described in Figure 13 outline only the specific nature of the facilities required, not their exact location or configuration. The latter must await route selection which would be undertaken at the tertiary planning level.

The matrix (Figure 13) outlines the major type of development opportunities that should be realized to encourage and foster a diversity of day and extended cruise operations. Of course, all development opportunities are recommended on the assumption that the preservation of the natural, historical and cultural resources of the area remain paramount,

Area Development Strategy

Honey Harbour Outdoor Recreation Area

To recognize the diversity of the zone's resource characteristics and development potential, the variation in the goals and objectives of different sectors of the tourism industry; the wide range of lifestyles and expectations of the zone's residents; private sector development proposals, and, future tourism and leisure trends through the application of different tourism development strategies on a nodal and corridor basis throughout the zone

● Leadership Role/Primary focus
○ Supporting Role/Secondary focus

● Primary Activity
○ Associated Activity

NO. OF RECREATION STRIPS	DEVELOPMENT PRIORITY	DEVELOPMENT OPPORTUNITIES	MARKET CHARACTERISTICS		TRIP CHARACTERISTICS		PRIMARY AND ASSOCIATED ACTIVITIES	ROLE/RESPONSIBILITY OF PRIVATE AND PUBLIC SETTINGS																																																																																														
			DEVELOPMENT POTENTIAL	GROUP MOBILITY	PRIMARY TRIP PURPOSE	TRAVEL MODE		PRIVATE	MUNICIPAL				PROVINCIAL		FEDERAL																																																																																							
			1	2	3	4		5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99
1	1	1.1	1.1.1	1.1.2	1.1.3	1.1.4	1.1.5	1.1.6	1.1.7	1.1.8	1.1.9	1.1.10	1.1.11	1.1.12	1.1.13	1.1.14	1.1.15	1.1.16	1.1.17	1.1.18	1.1.19	1.1.20	1.1.21	1.1.22	1.1.23	1.1.24	1.1.25	1.1.26	1.1.27	1.1.28	1.1.29	1.1.30	1.1.31	1.1.32	1.1.33	1.1.34	1.1.35	1.1.36	1.1.37	1.1.38	1.1.39	1.1.40	1.1.41	1.1.42	1.1.43	1.1.44	1.1.45	1.1.46	1.1.47	1.1.48	1.1.49	1.1.50	1.1.51	1.1.52	1.1.53	1.1.54	1.1.55	1.1.56	1.1.57	1.1.58	1.1.59	1.1.60	1.1.61	1.1.62	1.1.63	1.1.64	1.1.65	1.1.66	1.1.67	1.1.68	1.1.69	1.1.70	1.1.71	1.1.72	1.1.73	1.1.74	1.1.75	1.1.76	1.1.77	1.1.78	1.1.79	1.1.80	1.1.81	1.1.82	1.1.83	1.1.84	1.1.85	1.1.86	1.1.87	1.1.88	1.1.89	1.1.90	1.1.91	1.1.92	1.1.93	1.1.94	1.1.95	1.1.96	1.1.97	1.1.98	1.1.99	1.1.100
2	2	2.1	2.1.1	2.1.2	2.1.3	2.1.4	2.1.5	2.1.6	2.1.7	2.1.8	2.1.9	2.1.10	2.1.11	2.1.12	2.1.13	2.1.14	2.1.15	2.1.16	2.1.17	2.1.18	2.1.19	2.1.20	2.1.21	2.1.22	2.1.23	2.1.24	2.1.25	2.1.26	2.1.27	2.1.28	2.1.29	2.1.30	2.1.31	2.1.32	2.1.33	2.1.34	2.1.35	2.1.36	2.1.37	2.1.38	2.1.39	2.1.40	2.1.41	2.1.42	2.1.43	2.1.44	2.1.45	2.1.46	2.1.47	2.1.48	2.1.49	2.1.50	2.1.51	2.1.52	2.1.53	2.1.54	2.1.55	2.1.56	2.1.57	2.1.58	2.1.59	2.1.60	2.1.61	2.1.62	2.1.63	2.1.64	2.1.65	2.1.66	2.1.67	2.1.68	2.1.69	2.1.70	2.1.71	2.1.72	2.1.73	2.1.74	2.1.75	2.1.76	2.1.77	2.1.78	2.1.79	2.1.80	2.1.81	2.1.82	2.1.83	2.1.84	2.1.85	2.1.86	2.1.87	2.1.88	2.1.89	2.1.90	2.1.91	2.1.92	2.1.93	2.1.94	2.1.95	2.1.96	2.1.97	2.1.98	2.1.99	2.1.100

Figure 13

that the level of development is commensurate with the objectives and aspirations of the local residents and that local governments have a meaningful involvement in the planning and development processes.

The intention is to provide for the visitor a "wilderness" recreational experience. The cruise operations, in order to attract high expenditure tourists, require the development of a marine park system at both the federal and provincial levels. The marine parks would be the primary nodes or support base scattered through the Islands for the cruises and tour-boat charters. The park system should be complemented with comprehensive interpretative/information and marketing programs; such a park system would allow control over visitor distribution in order to ensure safety and to streamline visitation. By streamlining visitation, the tourist enjoys a pleasant uncrowded experience while the system's capacity is extended to the maximum number of visitors.

It is suggested that the provincial and federal governments encourage the private sector to develop the shore-based facilities of the marine park system. Rigorous environmental controls to protect the resource base and concentrating necessary developments into nodes, should mitigate any detrimental effects.

To extend the market segment for escape cruises, an effort should be made to create direct linkages with the Metro Toronto hotel system. For U.S. and international tourists in particular, the theme of an exploratory one or two-day visit to the Canadian Shield - just two hours away - might be very attractive.

Until route selection is completed, and the precise locations and capacities of the developed sites and attractions are known, it is extremely difficult and quite premature to define the number and itineraries of the trips that should be arranged, the type of boats that should be used and the passenger capacity they should have. It is, therefore, recommended that the following process be used to define the above requirements and establish the various excursions.

- i) Identify the attractions and opportunities located throughout the area;
- ii) Estimate their optimum and maximum capacities for relevant tourism and recreation uses;
- iii) Identify a system of water routes that connect these attractions and describe the type and sizes of boat that can get to these attractions;
- iv) Identify and locate the support facilities required to service the commercial cruise vessels and their passengers at the beginning, during and at the end of the routes;
- v) Conduct a feasibility study that will identify the level of attendance required to make any of the trips/cruises commercial viable;
- vi) Establish co-operative public and private sector development, management and promotion programs;
- vii) Finalize a number of routes for short, intermediate and extended cruises, mark these routes in a manner approved by the Department of Transport;
- viii) Initiate the appropriate level of service and monitor the results.

The above recommendations must be kept in mind when evaluating the following suggestions:

Day Trips

- Out of Honey Harbour throughout the nearby 30,000 islands, both guided and bare-boat charter.
- Out of Port Severn throughout the Gloucester Pool (and possibly Six Mile Lake) area, and the nearby 30,000 islands, both guided and bare-boat charter.
- Out of Midland throughout the nearby 30,000 islands, both guided and bare-boat charter.

"Escape" Cruises

An "escape" cruise is an organized extended cruise throughout the 30,000 islands, lasting for three to four days, with the itinerary for each day carefully planned in advance. Participants normally bring their own boats, are organized into squadrons, and are led by experienced guide-boats along the planned route, stopping at beaches, attractions, remote resorts for barbeques, dances or other group activities and ending at a destination resort such as Honey Harbour on the final night for a fairly elaborate dinner and dance. The 30,000 island "escape" cruise should occur several times per season, and be organized and promoted out of the Midland waterfront complex, specifically the Tour Boat Centre.

A major advantage of this type of a cruise is its capability to provide benefits to a wide range of commercial establishments and to develop an enthusiastic repeat clientele. To emphasize the social nature of these excursions and to extend these activities into the non-boating season through other events ("shore cruises", no-boat parties), touring clubs could be organized by the operators in an effort to capitalize fully on this specialty market.

Overnight Cruises

Overnight cruises should be promoted out of Midland and Honey Harbour, again on a guided or bare-boat charter arrangement. Houseboats to explore, in a leisurely manner, the inland lakes or the well protected areas throughout the 30,000 islands could be rented out of Port Severn or Honey Harbour. Such cruises can be marketed to retired individuals living in waterfront or resort communities.

Canoe Routes

Drawing 11 identifies an existing canoe route. This and other routes connecting primitive campsites, natural and cultural attractions or other features with easily accessible car parks and overnight facilities should be promoted.

8.3.2 Area 2 Midland-Penetanguishene Tourism Destination Area (See Figure 14)

The Midland-Penetanguishene area has been designated as a Tourism Destination Area in which tourism and recreation development services and programming will reflect the following area development strategy:

The short term objective is to stimulate day-use and short-term visitation (overnight/week-end) on an extended seasonal basis by regional (regional U.S.) and local market segments through the development of an integrated network of one or more tourism destination attractions and complementary tourism developments offering a range of facilities, attractions, activities and events, and developed on a nodal concept basis by the private sector. The long-term objective is to improve and diversify the tourism and recreation plant so that it can attract and accommodate year-round visitation by provincial as well as regional market segments.

a) Development Intent

The basic development intent for the Midland-Penetanguishene Tourism Destination Area is, therefore, to create unique innovative commercial attractions and facilities that will serve as major travel generators. The attractions should be integrated with existing complementary developments and should create the volume of tourist traffic to support the upgrading and expansion of the accommodation sector.

Midland:

Water-oriented tourism and recreation development complexes are proposed for the waterfront in Midland. Major travel generators would be the Tour Boat Centre for day and extended cruises, an entertainment/commercial complex located within renovated grain elevators and an Aquarama in a freighter moored alongside the entertainment/commercial complex. Other developments, complementary and integrated with the major travel generators would be a full-service

Area Development Strategy

Midland / Penetanguishene Tourism Destination Area

AREA DEVELOPMENT STRATEGY		TOURISM DEVELOPMENT STRATEGY										ROLE/RESPONSIBILITY OF PRIVATE AND PUBLIC SECTORS									
DEVELOPMENT PRIORITY	DEVELOPMENT OPPORTUNITIES	DEVELOPMENT APPROACH	MARKET CHARACTERISTICS		TRIP CHARACTERISTICS		PRIMARY AND ASSOCIATED ACTIVITIES		PHYSIO	ROLE/RESPONSIBILITY OF PRIVATE AND PUBLIC SECTORS											
			DEVELOPMENT APPROACH	MARKET CHARACTERISTICS	TRIP CHARACTERISTICS	PRIMARY AND ASSOCIATED ACTIVITIES	PRIVATE	MUNICIPAL		PROVINCIAL	OTHER										
												DEVELOPMENT APPROACH	MARKET CHARACTERISTICS	TRIP CHARACTERISTICS	PRIMARY AND ASSOCIATED ACTIVITIES	PRIVATE	MUNICIPAL	PROVINCIAL	OTHER		
AREA	DEVELOPMENT STRATEGY	DEVELOPMENT APPROACH	MARKET CHARACTERISTICS	TRIP CHARACTERISTICS	PRIMARY AND ASSOCIATED ACTIVITIES	PHYSIO	PRIVATE	MUNICIPAL	PROVINCIAL	OTHER	PRIVATE	MUNICIPAL	PROVINCIAL	OTHER							
1	Entertainment Complex	1	Entertainment Complex	1	Entertainment Complex	1	Entertainment Complex	1	Entertainment Complex	1	Entertainment Complex	1	Entertainment Complex	1							
2	Shopping/Craft Arcade	2	Shopping/Craft Arcade	2	Shopping/Craft Arcade	2	Shopping/Craft Arcade	2	Shopping/Craft Arcade	2	Shopping/Craft Arcade	2	Shopping/Craft Arcade	2							
3	Live Theatre (In-Home)	3	Live Theatre (In-Home)	3	Live Theatre (In-Home)	3	Live Theatre (In-Home)	3	Live Theatre (In-Home)	3	Live Theatre (In-Home)	3	Live Theatre (In-Home)	3							
4	Circus/Stage Theatre	4	Circus/Stage Theatre	4	Circus/Stage Theatre	4	Circus/Stage Theatre	4	Circus/Stage Theatre	4	Circus/Stage Theatre	4	Circus/Stage Theatre	4							
5	Outdoor Beer Garden	5	Outdoor Beer Garden	5	Outdoor Beer Garden	5	Outdoor Beer Garden	5	Outdoor Beer Garden	5	Outdoor Beer Garden	5	Outdoor Beer Garden	5							
6	Apartment	6	Apartment	6	Apartment	6	Apartment	6	Apartment	6	Apartment	6	Apartment	6							
7	Bar/Club	7	Bar/Club	7	Bar/Club	7	Bar/Club	7	Bar/Club	7	Bar/Club	7	Bar/Club	7							
8	Sailboat	8	Sailboat	8	Sailboat	8	Sailboat	8	Sailboat	8	Sailboat	8	Sailboat	8							
9	Boat Builder	9	Boat Builder	9	Boat Builder	9	Boat Builder	9	Boat Builder	9	Boat Builder	9	Boat Builder	9							
10	Custom Shop	10	Custom Shop	10	Custom Shop	10	Custom Shop	10	Custom Shop	10	Custom Shop	10	Custom Shop	10							
11	Cannery/Shop	11	Cannery/Shop	11	Cannery/Shop	11	Cannery/Shop	11	Cannery/Shop	11	Cannery/Shop	11	Cannery/Shop	11							
12	Deck Manufacturer	12	Deck Manufacturer	12	Deck Manufacturer	12	Deck Manufacturer	12	Deck Manufacturer	12	Deck Manufacturer	12	Deck Manufacturer	12							
13	Hardware Shop	13	Hardware Shop	13	Hardware Shop	13	Hardware Shop	13	Hardware Shop	13	Hardware Shop	13	Hardware Shop	13							
14	Trailer Manufacturer	14	Trailer Manufacturer	14	Trailer Manufacturer	14	Trailer Manufacturer	14	Trailer Manufacturer	14	Trailer Manufacturer	14	Trailer Manufacturer	14							
15	Water Repair	15	Water Repair	15	Water Repair	15	Water Repair	15	Water Repair	15	Water Repair	15	Water Repair	15							
16	Commercial Storage	16	Commercial Storage	16	Commercial Storage	16	Commercial Storage	16	Commercial Storage	16	Commercial Storage	16	Commercial Storage	16							
17	Marine Services	17	Marine Services	17	Marine Services	17	Marine Services	17	Marine Services	17	Marine Services	17	Marine Services	17							
18	Marine Supplies	18	Marine Supplies	18	Marine Supplies	18	Marine Supplies	18	Marine Supplies	18	Marine Supplies	18	Marine Supplies	18							
19	Marine Industries	19	Marine Industries	19	Marine Industries	19	Marine Industries	19	Marine Industries	19	Marine Industries	19	Marine Industries	19							
20	Marine Recreation	20	Marine Recreation	20	Marine Recreation	20	Marine Recreation	20	Marine Recreation	20	Marine Recreation	20	Marine Recreation	20							
21	Marinefront Day Use Park	21	Marinefront Day Use Park	21	Marinefront Day Use Park	21	Marinefront Day Use Park	21	Marinefront Day Use Park	21	Marinefront Day Use Park	21	Marinefront Day Use Park	21							
22	Accommodation Complex	22	Accommodation Complex	22	Accommodation Complex	22	Accommodation Complex	22	Accommodation Complex	22	Accommodation Complex	22	Accommodation Complex	22							
23	Hotel/Motel	23	Hotel/Motel	23	Hotel/Motel	23	Hotel/Motel	23	Hotel/Motel	23	Hotel/Motel	23	Hotel/Motel	23							
24	Commercial Hotel	24	Commercial Hotel	24	Commercial Hotel	24	Commercial Hotel	24	Commercial Hotel	24	Commercial Hotel	24	Commercial Hotel	24							
25	Commercial Establishments	25	Commercial Establishments	25	Commercial Establishments	25	Commercial Establishments	25	Commercial Establishments	25	Commercial Establishments	25	Commercial Establishments	25							
26	Four Star Centre	26	Four Star Centre	26	Four Star Centre	26	Four Star Centre	26	Four Star Centre	26	Four Star Centre	26	Four Star Centre	26							
27	Marinefront, Baseballs, Cycle Path	27	Marinefront, Baseballs, Cycle Path	27	Marinefront, Baseballs, Cycle Path	27	Marinefront, Baseballs, Cycle Path	27	Marinefront, Baseballs, Cycle Path	27	Marinefront, Baseballs, Cycle Path	27	Marinefront, Baseballs, Cycle Path	27							
28	Harbour Fest	28	Harbour Fest	28	Harbour Fest	28	Harbour Fest	28	Harbour Fest	28	Harbour Fest	28	Harbour Fest	28							
29	Winter Sport	29	Winter Sport	29	Winter Sport	29	Winter Sport	29	Winter Sport	29	Winter Sport	29	Winter Sport	29							
30	Winter Fest	30	Winter Fest	30	Winter Fest	30	Winter Fest	30	Winter Fest	30	Winter Fest	30	Winter Fest	30							
31	Winter Fest	31	Winter Fest	31	Winter Fest	31	Winter Fest	31	Winter Fest	31	Winter Fest	31	Winter Fest	31							
32	Winter Fest	32	Winter Fest	32	Winter Fest	32	Winter Fest	32	Winter Fest	32	Winter Fest	32	Winter Fest	32							
33	Winter Fest	33	Winter Fest	33	Winter Fest	33	Winter Fest	33	Winter Fest	33	Winter Fest	33	Winter Fest	33							
34	Winter Fest	34	Winter Fest	34	Winter Fest	34	Winter Fest	34	Winter Fest	34	Winter Fest	34	Winter Fest	34							
35	Winter Fest	35	Winter Fest	35	Winter Fest	35	Winter Fest	35	Winter Fest	35	Winter Fest	35	Winter Fest	35							
36	Winter Fest	36	Winter Fest	36	Winter Fest	36	Winter Fest	36	Winter Fest	36	Winter Fest	36	Winter Fest	36							
37	Winter Fest	37	Winter Fest	37	Winter Fest	37	Winter Fest	37	Winter Fest	37	Winter Fest	37	Winter Fest	37							
38	Winter Fest	38	Winter Fest	38	Winter Fest	38	Winter Fest	38	Winter Fest	38	Winter Fest	38	Winter Fest	38							
39	Winter Fest	39	Winter Fest	39	Winter Fest	39	Winter Fest	39	Winter Fest	39	Winter Fest	39	Winter Fest	39							
40	Winter Fest	40	Winter Fest	40	Winter Fest	40	Winter Fest	40	Winter Fest	40	Winter Fest	40	Winter Fest	40							
41	Winter Fest	41	Winter Fest	41	Winter Fest	41	Winter Fest	41	Winter Fest	41	Winter Fest	41	Winter Fest	41							
42	Winter Fest	42	Winter Fest	42	Winter Fest	42	Winter Fest	42	Winter Fest	42	Winter Fest	42	Winter Fest	42							
43	Winter Fest	43	Winter Fest	43	Winter Fest	43	Winter Fest	43	Winter Fest	43	Winter Fest	43	Winter Fest	43							
44	Winter Fest	44	Winter Fest	44	Winter Fest	44	Winter Fest	44	Winter Fest	44	Winter Fest	44	Winter Fest	44							
45	Winter Fest	45	Winter Fest	45	Winter Fest	45	Winter Fest	45	Winter Fest	45	Winter Fest	45	Winter Fest	45							
46	Winter Fest	46	Winter Fest	46	Winter Fest	46	Winter Fest	46	Winter Fest	46	Winter Fest	46	Winter Fest	46							
47	Winter Fest	47	Winter Fest	47	Winter Fest	47	Winter Fest	47	Winter Fest	47	Winter Fest	47	Winter Fest	47							
48	Winter Fest	48	Winter Fest	48	Winter Fest	48	Winter Fest	48	Winter Fest	48	Winter Fest	48	Winter Fest	48							
49	Winter Fest	49	Winter Fest	49	Winter Fest	49	Winter Fest	49	Winter Fest	49	Winter Fest	49	Winter Fest	49							
50	Winter Fest	50	Winter Fest	50	Winter Fest	50	Winter Fest	50	Winter Fest	50	Winter Fest	50	Winter Fest	50							
51	Winter Fest	51	Winter Fest	51	Winter Fest	51	Winter Fest	51	Winter Fest	51	Winter Fest	51	Winter Fest	51							
52	Winter Fest	52	Winter Fest	52	Winter Fest	52	Winter Fest	52	Winter Fest	52	Winter Fest	52	Winter Fest	52							
53	Winter Fest	53	Winter Fest	53	Winter Fest	53	Winter Fest	53	Winter Fest	53	Winter Fest	53	Winter Fest	53							
54	Winter Fest	54	Winter Fest	54	Winter Fest	54	Winter Fest	54	Winter Fest	54	Winter Fest	54	Winter Fest	54							
55	Winter Fest	55	Winter Fest	55	Winter Fest	55	Winter Fest	55	Winter Fest	55	Winter Fest	55	Winter Fest	55							
56	Winter Fest	56	Winter Fest	56	Winter Fest	56	Winter Fest	56	Winter Fest	56	Winter Fest	56	Winter Fest	56							
57	Winter Fest	57	Winter Fest	57	Winter Fest	57	Winter Fest	57	Winter Fest	57	Winter Fest	57	Winter Fest	57							
58	Winter Fest	58	Winter Fest	58	Winter Fest	58	Winter Fest	58	Winter Fest	58	Winter Fest	58	Winter Fest	58							
59	Winter Fest	59	Winter Fest	59	Winter Fest	59	Winter Fest	59	Winter Fest	59	Winter Fest	59	Winter Fest	59							
60	Winter Fest	60	Winter Fest	60	Winter Fest	60	Winter Fest	60	Winter Fest	60	Winter Fest	60	Winter Fest	60							
61	Winter Fest	61	Winter Fest	61	Winter Fest	61	Winter Fest	61	Winter Fest	61	Winter Fest	61	Winter Fest	61							
62	Winter Fest	62	Winter Fest	62	Winter Fest	62	Winter Fest	62	Winter Fest	62	Winter Fest	62	Winter Fest	62							
63	Winter Fest	63	Winter Fest	63	Winter Fest	63	Winter Fest	63	Winter Fest	63	Winter Fest	63	Winter Fest	63							
64	Winter Fest	64	Winter Fest	64	Winter Fest	64	Winter Fest	64	Winter Fest	64	Winter Fest	64	Winter Fest	64							
65	Winter Fest	65	Winter Fest	65	Winter Fest	65	Winter Fest	65	Winter Fest	65	Winter Fest	65	Winter Fest	65							
66	Winter Fest	66	Winter Fest	66	Winter Fest	66	Winter Fest	66	Winter Fest	66	Winter Fest	66	Winter Fest	66							
67	Winter Fest	67	Winter Fest	67	Winter Fest	67	Winter Fest	67	Winter Fest	67	Winter Fest	67	Winter Fest	67							
68	Winter Fest	68	Winter Fest	68	Winter Fest	68	Winter Fest	68	Winter Fest	68	Winter Fest	68	Winter Fest	68							
69	Winter Fest	69	Winter Fest	69	Winter Fest	69	Winter Fest	69	Winter Fest	69	Winter Fest	69	Winter Fest	69							
70	Winter Fest	70	Winter Fest	70	Winter Fest	70	Winter Fest	70	Winter Fest	70	Winter Fest	70	Winter Fest	70							
71	Winter Fest	71	Winter Fest	71	Winter Fest	71	Winter Fest	71	Winter Fest	71	Winter Fest	71	Winter Fest	71							
72	Winter Fest	72	Winter Fest	72	Winter Fest	72	Winter Fest	72	Winter Fest	72	Winter Fest	72	Winter Fest	72							
73	Winter Fest	73	Winter Fest	73	Winter Fest	73	Winter Fest	73	Winter Fest	73	Winter Fest	73	Winter Fest	73							
74	Winter Fest	74	Winter Fest	74	Winter Fest	74	Winter Fest	74	Winter Fest	74	Winter Fest	74	Winter Fest	74							
75	Winter Fest	75	Winter Fest	75	Winter Fest	75	Winter Fest	75	Winter Fest	75	Winter Fest	75	Winter Fest	75							
76	Winter Fest	76	Winter Fest	76	Winter Fest	76	Winter Fest	76	Winter Fest	76	Winter Fest	76	Winter Fest	76							
77	Winter Fest	77	Winter Fest	77	Winter Fest	77	Winter Fest	77	Winter Fest	77	Winter Fest	77	Winter Fest	77							
78	Winter Fest	78	Winter Fest	78	Winter Fest	78	Winter Fest	78	Winter Fest	78	Winter Fest	78	Winter Fest	78							
79	Winter Fest	79	Winter Fest	79	Winter Fest	79	Winter Fest	79	Winter Fest	79	Winter Fest	79	Winter Fest	79							
80	Winter Fest	80	Winter Fest	80	Winter Fest	80	Winter Fest	80	Winter Fest	80	Winter Fest	80	Winter Fest	80							
81	Winter Fest	81	Winter Fest	81	Winter Fest	81	Winter Fest	81	Winter Fest	81	Winter Fest	81	Winter Fest	81							
82	Winter Fest	82	Winter Fest	82	Winter Fest	82	Winter Fest	82	Winter Fest	82	Winter Fest	82	Winter Fest	82							
83	Winter Fest	83	Winter Fest	83	Winter Fest	83	Winter Fest	83	Winter Fest	83	Winter Fest	83	Winter Fest	83							
84	Winter Fest	84	Winter Fest	84	Winter Fest	84	Winter Fest	84	Winter Fest	84	Winter Fest	84	Winter Fest	84							
85	Winter Fest	85	Winter Fest	85	Winter Fest	85	Winter Fest	85	Winter Fest	85	Winter Fest	85	Winter Fest	85							
86	Winter Fest	86	Winter Fest	86	Winter Fest	86	Winter Fest	86	Winter Fest	86	Winter Fest	86	Winter Fest	86							
87	Winter Fest	87	Winter Fest	87	Winter Fest	87	Winter Fest	87	Winter Fest	87	Winter Fest	87	Winter Fest	87							
88	Winter Fest	88	Winter Fest	88	Winter Fest	88	Winter Fest	88	Winter Fest	88	Winter Fest	88	Winter Fest	88							
89	Winter Fest	89	Winter Fest	89	Winter Fest	89	Winter Fest	89	Winter Fest	89	Winter Fest	89	Winter Fest	89							
90	Winter Fest	90	Winter Fest	90	Winter Fest	90	Winter Fest	90	Winter Fest	90	Winter Fest	90	Winter Fest	90							
91	Winter Fest	91	Winter Fest	91	Winter Fest	91	Winter Fest	91	Winter Fest	91	Winter Fest	91	Winter Fest	91							
92	Winter Fest	92	Winter Fest	92	Winter Fest	92	Winter Fest	92	Winter Fest	92	Winter Fest	92	Winter Fest	92							
93	Winter Fest	93	Winter Fest	93	Winter Fest	93	Winter Fest	93	Winter Fest	93	Winter Fest	93	Winter Fest	93							
94	Winter Fest	94	Winter Fest	94	Winter Fest	94	Winter Fest	94	Winter Fest	94	Winter Fest	94	Winter Fest	94							
95	Winter Fest	95	Winter Fest	95	Winter Fest	95	Winter Fest	95	Winter Fest	95	Winter Fest	95	Winter Fest	95							
96	Winter Fest	96	Winter Fest	96	Winter Fest	96	Winter Fest	96	Winter Fest	96	Winter Fest	96	Winter Fest	96							
97	Winter Fest	97	Winter Fest	97	Winter Fest	97	Winter Fest	97	Winter Fest	97	Winter Fest	97	Winter Fest	97							
98	Winter Fest	98	Winter Fest	98	Winter Fest	98	Winter Fest	98	Winter Fest	98	Winter Fest	98	Winter Fest	98							
99	Winter Fest	99	Winter Fest	99	Winter Fest	99	Winter Fest	99	Winter Fest	99	Winter Fest	99	Winter Fest	99							
100	Winter Fest	100	Winter Fest	100	Winter Fest	100	Winter Fest	100	Winter Fest	100	Winter Fest	100	Winter Fest	100							

modern marina with associated industries, a day-use park and accommodation. All facilities and attractions should be connected by vehicular and pedestrian circulation systems and water-based linkages. The conceptual relationships of these developments and existing attractions for Midland are illustrated on Drawing 5A.

Designated a Regional Service Centre, Midland should provide the community services to support the proposed developments.

Penetanguishene:

The development intent for Penetanguishene is to concentrate on the provision of day-use facilities, attractions, events and programs that commemorate the heritage and historic character of the town. The focus should be Heritage Harbour, located near the core of the Town. It is suggested that Penetanguishene becomes the historical/cultural centre of the Tourism Destination Area offering a wide variety of events, festivals, markets, and crafts as well as the attractions of Heritage Harbour, all celebrating the unique Franco-phone heritage and culture of the Town.

Drawing 5B illustrates the development strategy for Penetanguishene.

Emphasis will be placed upon integrating the attractions, facilities and services offered throughout the Midland-Penetanguishene Tourism Destination Area with each other and with other developments located throughout the Collingwood-Midland-Orillia Tourism Development Zone. This integration will occur through the integration of tour boat packages with Penetanguishene, Trent-Severn and Orillia, through the promotion of major cross-country events and

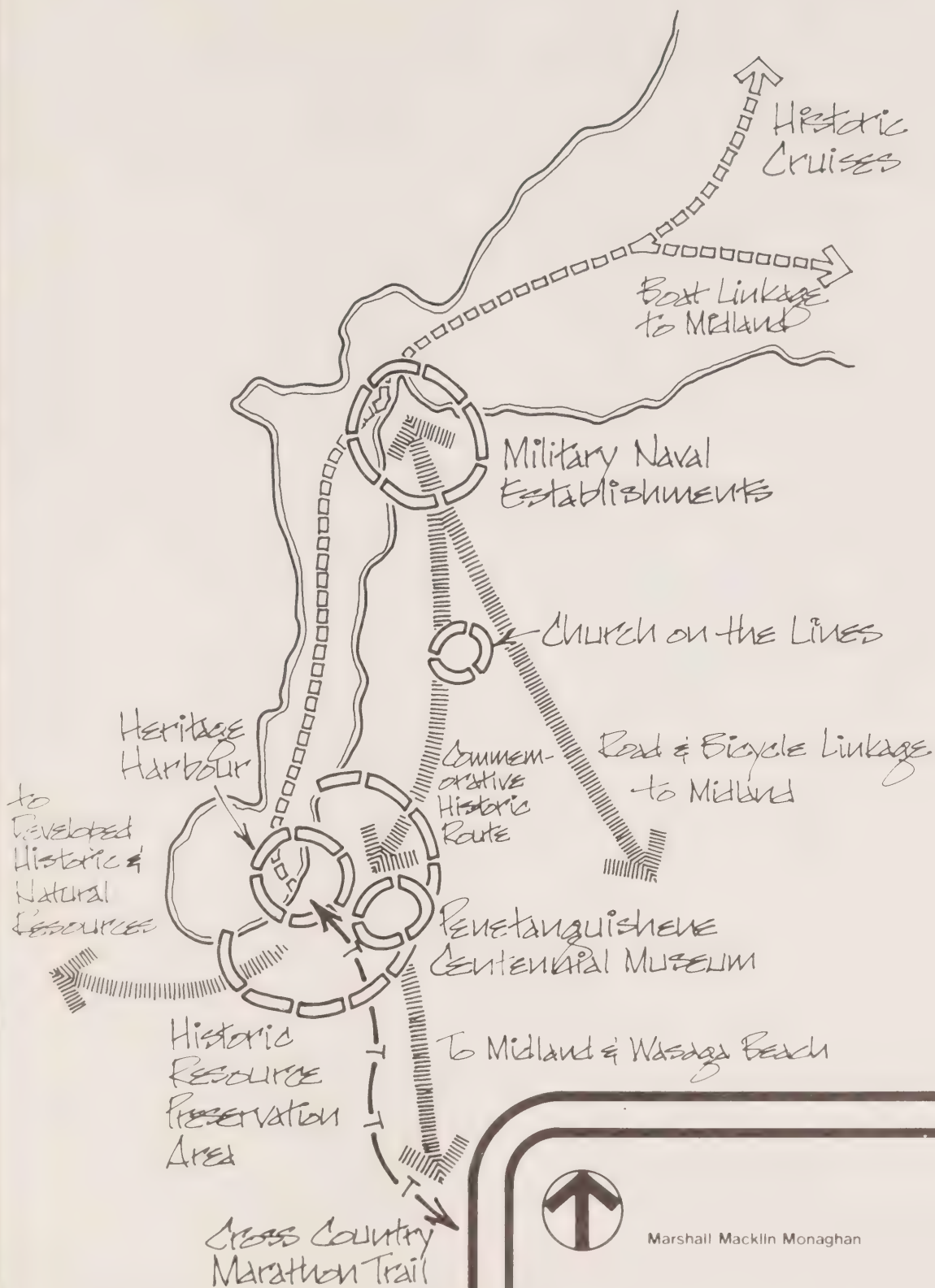


Marshall Macklin Monaghan

Midland Waterfront Development Concept

Collingwood · Midland · Orillia
Tourism Development Strategy

5a



Marshall Macklin Monaghan

Penetanguishene Development Concept

Collingwood · Midland · Orillia
Tourism Development Strategy

5b

marathons between Penetanguishene, Midland, Orillia, Horse-shoe Valley, and through the development of an integrated schedule and promotion program of events occurring in all Tourism Development Areas.

b) Development Opportunities, Midland

The Midland Waterfront Development Plan encompasses a number of major attractions and facilities including an entertainment complex, the aquarama, a modern, full-service marina, a waterfront park, an accommodation complex, the government docks and the tour boat centre, all linked together with a waterfront boardwalk, bicycle paths and boating routes. These facilities are described in more detail below.

The Entertainment Multiplex

The Entertainment complex is proposed for the grain elevators situated on the west side of Midland Bay. In this proposal, the silos are remodelled to house:

- * A restaurant located on top of the silos providing a panoramic view of the harbour, Midland and the 30,000 islands;
- * A cocktail lounge below the restaurant providing nightly entertainment and dancing opportunities;
- * A commercial shopping arcade containing a variety of craft and specialty shops;
- * A theatre in the round designed to show 360° films, surrounding the viewer with sound and action with possible conversion to an Imax theatre;

- * A live theatre, again in the round, for stage events ranging from Shakespearean plays to barbershop quartets;
- * Administrative services.

Attached to the walls of the silo, an elevator provides access to the restaurant lounge and viewing platforms. The front of the elevator is transparent so that the user has an excellent view of the inside of the silo as the elevator travels upward, which through the use of a number of projection devices, is used to display everything from wide angle panoramas of underwater life to historic naval battles.

Being totally enclosed, the facilities and attractions provided by the Entertainment complex should cater on a year-round basis to both the local residents and the regional visitors. The complex could serve both as an indoor shopping mall offering a wide variety and diversity of specialty shops and crafts, and as a cultural centre providing high quality facilities for concerts, plays, meetings, films and a myriad of special events. But because of the cost associated with remodelling of the existing structure, the commercial viability of the operations as described are very heavily dependent upon a number of conditions, none of which are insurmountable.

- * low cost of acquisition;
- * comprehensive rather than piecemeal development;
- * strong support from Midland and other urban centres in the vicinity;
- * strong support from business and community associations;

- * long-term technical and financial support from all senior levels of government;
- * strong, high quality promotion program; and
- * the selection and booking of high quality events and entertainments.

The grounds around the Entertainment centre should be carefully landscaped. In addition to carefully tended flower beds, grassy open spaces and restful nooks, the grounds should contain a creative, supervised playground for the younger visitors, and a paved, but unstructured, space designed for impromptu or scheduled events and surrounded by shaded seating areas. The landscaped grounds should provide a setting that melds together the Entertainment complex, the Aquarama and the modern marina into an attractive harmonious whole.

The Aquarama

Directly alongside the Entertainment complex will be moored a large freighter converted to a unique visitor attraction designed to accommodate 200,000 to 300,000 people per year. It is suggested that the freighter contain an Aquarama; a totally controlled aquatic environment housing a variety of indigenous and exotic aquatic habitats containing a wide variety of floral and faunal species. Reproduced to the degree possible and feasible should be such aquatic communities as occur on the Great Barrier Reef, in a Cypress or Mangrove Swamp, in a cool mountain lake, in hot springs, in underwater caves and throughout the Sargasso Sea.

Visitors should be guided through, over and around these aquatic habitats so that their perspective of these watery worlds can change continually, including passage through clear acrylic tunnels, so that the variety of species on

display are seen floating overhead. A complete interpretation program should, through audio-visual, graphics, books, and other means, emphasize the uniqueness of the contribution made by such ecological communities to the well-being of earth and man.

Visitors should be able to descend into the various habitats using bathyspheres or diving bells, and particular areas should encourage the visitor to don snorkelling gear and explore these "wonders of the deep". Above deck, resting, relaxation and entertainment areas should permit the patrons to sit and watch the activities in Midland's harbour or enjoy a series of events and competitions being staged nearby.

Marina

The proposed marina should provide all the facilities and services required by the boating public. Containing at least 600 slips when fully developed, the marina should have the capability to handle a large variety of crafts, from large yachts and power cruisers to small dinghies and run-abouts. Services should include pumpouts, gasoline products, water electricity and washroom facilities, boat launching gear and ramps, fish bait and tackle supplies and a small variety store.

The marina should be designed to serve two distinct clientele, the seasonal boater who will be dependent upon the marina for moorage, storage and repair, and the transient boater who will be using mooring facilities while obtaining supplies and visiting other attractions. The first stage of the development should be oriented towards the seasonal boater, with only 20% to 25% of the berths allocated to the transient boater. As the waterfront complex is developed, more transient boating facilities could be added as demand warrants. Over time, therefore, the marina should reflect more closely the actual demand pattern occurring in the future.

Although the marina should not provide charter services, as that function is carried out by the Tour Boat Centre, it could provide boat rental facilities where the visitor can obtain small crafts for day-use activities, power boats equipped for waterskiing and hang-gliding, and wind surfing equipment. In the winter, ice boats, skate sailing equipment and other material could be rented from the marina.

Efforts should be made to entice a wide variety of modern day boat-oriented industries to locate directly behind the marina. Such industries could range from do-it-yourself repair and refitting shops to boat builders and sailmakers; from the designers and construction of docks, cradles and trailers to the producers of custom-designed fittings, tops and upholstery. Where possible, the industries should provide guided tours and/or interpretive programs describing, among other things, the problems and process of shaping fibre-glass, aluminum or wood into catamarans, sailboats, kayaks and surfboards, or the intricacies involved in sail design and production.

The industries, warehouses, boat storage yards, and boat rental operations together with the other required boat and boating facilities should all contribute strongly to the distinctive nautical atmosphere, creating for the visitor and boater alike, an extremely enjoyable experience.

Waterfront Park

Waterfront Park should provide facilities for a variety of unstructured recreation activities. Footpaths and trails should connect the picnicking areas and children's playgrounds with the waterfront boardwalk and viewing platforms. It should provide a peaceful atmosphere for both the visitor and the residents of Midland, illustrating the Waterfront Development Plan's commitment to both the tourist and the local municipality.

Accommodation/Commercial Complex

A modern hotel/motel of at least 80 to 100 waterfront units and also containing food, lounge and entertainment facilities is proposed for development just east of the government docks. Situated directly on the water's edge and with a strong waterfront orientation in both design and services, it should cater to boat as well as auto traffic, and should be connected to the other components of the waterfront development by boardwalk and jitney service. The hotel/motel guests using golfcarts for transportation will be able to enjoy the nearby golf-course located just southwest of Midland.

During the later stages of the implementation of the Waterfront Development Plan, and if demands warrant it, a condominium hotel, located on the waterfront northeast of the Government Docks, is proposed. In addition, it is suggested that major commercial establishments having some relation to the tourism industry be encouraged to develop facilities along the waterfront. Even if they provide no direct services to the tourist, their presence, through careful design of buildings and landscaped settings, could contribute immensely to the overall attractiveness of Midland's Waterfront.

Government Docks

No major renovations or alterations are contemplated, except that the Government Docks should be included in the waterfront pedestrian boardwalk system linking all facilities and attractions between the Entertainment complex and Ste. Marie among the Hurons.

Tour Boat Centre

All tours except those originating from Heritage Harbour will operate out of the Tour Boat Centre which should have the capacity to handle 150,000 visitors per year. Its reservation system should allow visitors to obtain information on and make reservations for any scheduled trip. The Centre should also provide a complete chartering service, providing up-to-date information on the availability of vessels, crews and equipment.

Special Great Lakes charters should be arranged by the Tour Boat Centre. Overnight and extended cruises throughout the 30,000 island system, through the Trent-Severn to Orillia, and to other destination areas can be booked there also. The reservation system should integrate this marine travel network with water-associated accommodation facilities, to complement tour packages that will permit extended visits at any of these accommodation facilities.

The development, activities and programs proposed for the waterfront area will complement the visitor attraction and commemorative programs presented at Ste. Marie among the Hurons, the Shrine and the Wye Marsh. A further integration through boat tours and a pedestrian/bicycle boardwalk located along the waterfront from Ste. Marie among the Hurons to the Entertainment complex is proposed. In addition, it is recommended that increased funding be made available to permit completion of the restoration program at Ste. Marie and enlargement of its commemoration program; that there be a continued program for developing the facilities and commemoration programs at the Wye Marsh, and that these attractions be further integrated in the marketing programs for the entire Midland-Penetanguishene Tourism Destination Area.

c) Events

The facilities, services and programs available along the waterfront, when the proposed developments are in place, will provide the basic ingredients from which a strong market identity for the Midland area can be created. Major events are proposed that will combine these attractions into an excellent vehicle through which this market identity can be promoted.

Harbour Fest

A 3 to 4 day celebration of ships and water, Harbour Fest is envisioned as a festive occasion where visitors can participate in a great variety of activities in the Midland-Penetanguishene area. The festival will be opened by the entrance of all available sailing vessels, passing by in review and mooring in Heritage Harbour. All ships will be open to the public and provide continual demonstrations of traditional sailing arts and crafts such as setting, dousing and bracing canvas, ships carpentry, games, shipboard activities and chantey singing.

There will be a variety of children's events in Waterfront Park. Music bands varying from bluegrass and western to rock will provide day and night entertainment, culminating in a classical concert performed under the stars capped by a floating fireworks extravaganza.

Spectators will be treated to a water ski ballet, a mock naval battle, boat races, precision parachuting, sky-diving and hang-gliding. Harbour Fest will also include a boat show, boat building workshops, a parade of ships crews in costume and dress uniforms, much dancing and will be closed by a costumed ball commemorating the war of 1812.

Winter Sport

Designed to foster friendly competition between urban centres throughout the Collingwood-Midland-Orillia Zone, as well as draw competitors and spectators from other areas, Winter Sport will focus on activities and competitions that can be held on ice. While providing sport enthusiasts with a variety of competitive events including ice-boat racing and skate sailing, speed, figure and long-distance skating, hockey and other ice games, Winter Sport will also provide many opportunities for more passive recreation activities such as sleigh rides, ice fishing and family skating. Interspersed among the major events such as the skate marathon from Penetanguishene to Midland, will be indoor demonstrations, shows, concerts and dances, and workshops and lessons providing information and instructions on everything from speed-skating to ice-boat building.

d) Development Opportunities: Penetanguishene

All tourism efforts in Penetanguishene should be oriented towards the accentuation and commemoration of the historic resources and character of the village. To this end, a complete inventory and description of the extant resources should be undertaken. This study will provide information on the location and significance of the surviving historic fabric of the town, and will suggest actions that should be undertaken to preserve and commemorate those resources.

The major maritime/historical attraction proposed is Heritage Harbour whose adjacent shoreline development should evoke an historical atmosphere through careful control of design and architecture.

Heritage Harbour

Essentially a living museum, Heritage Harbour should be a variety of sailing vessels resting quietly at anchor, forming the centre of a bustle of activity. Replicas of the "tall ships" that sailed the Great Lakes, included among these vessels at any one time may be La Salle's Griffon, the H.M.S. Nancy, the Scorpion or the Tigress.

The wharves should be piled high with sails, ropes, chocks and all of the other paraphernalia required to maintain a sailing vessel. Sailors and stevedores in period costumes should be busily loading bales, casks, chests and crates into the hold of the H.M.S. Nancy while the Scorpion could be getting ready to raise sail. On land a keel may be underway for a 3-masted schooner, while directly behind the activities of the shipwrights, should be located a variety of small industries supplying the materials and services required to maintain and repair the ships. Included may be a ships carpentry shop, set up as it would have been aboard a sailing ship, a spar-making shop, a smithy as well as woodcarvers, rope making and a furniture shop. A ships chandlery can be recreated to show the kinds of food, repair material, navigational aids and other equipment that were required on the extensive voyages in sailing ships.

As apparent from the above description, the intent of heritage harbour is to commemorate a very interesting part of Canadian history, and to make this history come alive for the visitors. Again, all establishments, including the vessels should be open to the public, the overall capacity should be 400,000 to 500,000 people per year. An interpretation centre located in a period warehouse should include demonstrations of the dousing and bracing of canvas, sailor's arts and crafts carried out as pastimes, and chantey singing. Other

modern but compatible activities could add to the enjoyment of the experience. Visitors should be able to purchase ice boats and skate sailing equipment, skiffs and dories as well as finely crafted pine furniture and wood carvings. When satiated they will be encouraged to enjoy the bustle while resting in a small restaurant/coffee shop overlooking the harbour.

The possibility for developing a major historic marine museum in association with the Heritage Harbour should be investigated. It could be an excellent means for providing a comprehensive overview of the important aspects of the use and development of the Great Lakes area.

On a regular schedule, the sailing vessels will take passengers for short or extended cruises throughout the Georgian Bay area; stopping at many ports of call including Wasaga Beach. To add to the colour and excitement of such voyages, mock naval engagements with "enemy" vessels such as the Pride of Baltimore may occur.

It is recommended that the accommodation sector of the waterfront development proposal be expanded to 40 to 50 units and be re-located within the Heritage Harbour area. The architecture and design of the accommodation should reflect and blend with the maritime/historic theme of the Harbour.

It is suggested that Heritage Harbour be operated by a non-profit organization that is supported financially and/or technically by major foundations, entrance fees, private donations and all levels of government. Technical support should be available from the heritage preservation branches of the senior levels of government, from museums, from historical associations and from other communities having

established similar attractions (Ships of the Seas Museum, and Factory Walk, Savannah, Georgia; Mariners Museum, Newport Mews, Connecticut; Jamestown Festival Park with full-scale replicas of the Susan Constant, Godspeed and Discovery, Jamestown, Virginia; Historic Waterfront Properties, Halifax).

Penetanguishene is envisioned as the cultural center of the Midland-Penetanguishene Tourism Destination Area, giving the visitor, through preserved architectural resources and the emphasis upon other cultural activities, a greater understanding of the customs, food, music and other elements that symbolize French Canadian heritage. Therefore, Penetanguishene is encouraged to pass strict architectural controls that will prevent the demolition of its surviving historic fabric, and that will ensure that new construction will be sympathetic to existing architectural styles.

A social and cultural history of the town and its people is necessary to provide background information on all types of festivals, competitions or other cultural events that occurred in the past. Together, the results of these studies will provide a foundation upon which to build facilities and programs for visitor attraction and enjoyment.

The intent is to create a market awareness of distinctive cultural events that have regional attraction throughout the year. To realize this intent a local historical/tourism organization needs to be established and given the authority, responsibility and support by the Area Council to investigate and propose a schedule of significant cultural events and to outline the facilities and programs required to hold these events. Assistance can then be sought from private entrepreneurs, and local and provincial governments for constructing or otherwise making the required facilities

available. Once the permanent facilities are in place the historic resources and attractions located throughout the Town can then be integrated into the general program, through scheduled visits, historic walking town tours or in association with events.

It is also recommended that a number of major and minor cultural events be scheduled throughout the summer and/or winter. One possibility would be to create and promote a major water carnival capitalizing on the waterfront. The winter carnival can focus on traditional winter activities that can be carried out on either land or water including snowshoe and dogsled races, ice sculptures or arts and crafts displays and competitions. Associated with the winter carnival could be a major cross-country event originating in Orillia, passing through Horseshoe Valley and Midland and culminating in Penetanguishene to kick off the festivities there. Indoor activities, celebrating aspects of French traditions, including concerts, live theatre, games and dances will round out the festivities. A museum expansion and upgrading program should be undertaken in conjunction with the cultural/historic events being promoted so that special displays, interpretive programs or the required artifacts can be created or acquired.

The projections described by Toronto In Transition: Demographic Trends In the Toronto Region (1980) suggest that there is a net out-migration of mature households at or near the retirement age level from Metro Toronto to the surrounding regions. A major portion of this out-migration is occurring northward, especially into areas where desired amenities and lifestyles are available.

The development of a strong community identity as a cultural centre, and the protection of its historic atmosphere coupled with its nearness to quality outdoor recreation

attractions and resources give Penetanguishene an excellent basis for attracting these mature households. Therefore, the potential for developing pension forms of accommodation or even a four-season resort accommodation on the northwest section of Penetanguishene bay should be explored in a serious manner.

Since the Midland-Penetanguishene offers diverse complementary activities, it is suggested that the promotion of packages to encompass all the events/attractions be facilitated through such a device as the issuing of Passports or Passbooks. The visitor could obtain the passport either when he/she books the package tour in, for example, Toronto, at Tourist Information Centres, or at ticket offices located in the Tour Boat Centre and other major attractions in the area. (The device has proven its popularity at Expo, Toronto's Caravan, and the Alberta and Newfoundland Stamp Arounds).

The passbook system has the advantage of facilitating the integration and co-ordination of events and generating tourist traffic for the area which in turn contributes to the financial viability of accommodation establishments. By combining elements into one to three day bus and/or boat tours and scheduling events throughout the year, the Midland-Penetanguishene Tourism Destination Area could exploit its potential to be an extended, or possibly four-season tourism area.

It is recommended that attractions/events be the subject of an organized marketing program and be co-ordinated locally into 'packages'.

The Passport ticket could entitle the holder to visit these facilities/attractions: the Entertainment/Commercial multiplex, the Aquarama; Heritage Harbour; Waterfront Park; Ste. Marie among the Hurons; the Martyrs' Shrine; Wye Marsh; Naval Museum.

Arrangements could be made locally, on year round or seasonal basis to extend the Passport to include one or some of the following events/attractions/activities/recreational opportunities: Harbour Fest; Historical cruises; mock naval/historic battles; Great Lakes charter; extended cruises through the Severn Waterway or 30,000 Islands; historic walking tours; tours of shipbuilding industries/crafts; summer Water Carnival; Winter Carnival; winter sports (i.e. ice boat racing, skate sailing, ice fishing, ice hockey and other ice games, family skating, sleigh rides); skate marathon; cross-country ski marathon; shows; plays; dances; workshops; craft displays.

8.3.3 Area 3 Severn River Historic/Recreational Waterway (See Figure 15)

The Severn River from Washago to Port Severn is designated as a Historic/Recreational Waterway along which tourism and recreation developments, services and programming will reflect the following area development strategy:

To stimulate day-use visitation on a year-round basis by regional and local market segments through an upgrading and expansion of existing day-use facilities and attractions and a further development of the area's natural, historical, cultural and other attractions, developed on a non-integrated, non-nodal concept basis by both the public and private sectors.

a) Area Development Intent

The development intent is basically two-fold. First, the intent is to provide additional recreation facilities, services and attractions for boaters travelling along the Trent-Severn Waterway, and second, to develop a package boat/autobus/auto tour that provides non-boat owners an opportunity to experience, in a leisurely fashion, the natural, historical and cultural attractions along the waterway. To realize these development intents, it is proposed to upgrade and expand boat service and accommodation facilities at Port Severn, Severn Falls and Port Stanton, and to identify and intercept the natural, historical and cultural features throughout Gloucester Pool, Sparrow Lake, and the Severn River. The development intent should be realized within the natural and environmental carrying capacity of the Waterway.

Parks Canada will be encouraged to examine its existing policies, developments and programs with a view towards their orientation and expansion for enjoyment by the travelling public and stimulation of the tourist industry.

Area Development Strategy

WORLDWIDE DEVELOPMENT STRATEGIES

to recognize the diversity of the zone's resource characteristics and development potential, the variation in the goals and objectives of different sectors of the tourism industry, the wide range of lifestyles and expectations of the zone's residents, private sector development proposals, and future tourism and leisure trends through the application of different tourism development strategies on a nodal and corridor basis throughout the zone.

Severn River Historical / Recreational Waterway

● Leadership Role/Primary focus
○ Supporting Role/Secondary focus

- Primary Activity
- Associated Activity

[illegible]

Orillia/Lake Couchiching and Tiny Shoreline Outdoor Recreation Areas

[illegible]

Figure 15

The same shore-based facilities can be used to support snowmobile rallies and snowshoe/skating marathons from Orillia to Port Severn and return.

b) Development Opportunities

The summer oriented development opportunities outlined below are associated with the proposed boat tours from Port Severn to Orillia. It is expected that other boaters exploring the Severn River system will also benefit directly from the upgrading and construction of recommended facilities and programs.

The packaged boat tour is envisioned as follows:

Day 1 Bus arrives at Port Severn at or near lunch time, and after lunch the passengers board the tour boat for a leisurely exploration of Gloucester Pool and the Severn River to Severn Falls. Stops are made at natural, historical and cultural features along the way, including the marine railway, lock stations, viewpoints, carefully selected and designed archaeological sites, remnants of historic settlements and logging activities and special natural attractions, such as rock formations, waterfalls and ecological communities. Passengers overnight at Severn Falls where accommodation, food, beverage and entertainment facilities and programs are provided.

Day 2 Cruise from Severn Falls to major resorts in the Orillia-Lake Couchiching area, for example Fern Resort, exploring the man-made and historical attractions along the route. Special events and entertainment are planned for later in the day and during the evening, including recitals and other programs at the Steven Leacock Residence.

At this point, the participants have the option to return to their homes by bus or auto, or stay overnight for the return leg of the tour.

Day 3 Bus arrives at resorts and the tour boat leaves the resorts in the early afternoon and travels to Port Severn. Again special events or recreation activities, including the opportunity to go fishing, hiking etc, are planned.

Day 4 Cruise from Port Stanton to Port Severn with a special program at Port Severn to wind up the tour.

The development requirements or opportunities are:

Port Severn: upgrading of the accommodation facilities, marina and marina services. The latter could provide facilities for renting house boats for exploring the Gloucester Pool Area.

Severn Falls: upgrading expansion and construction of boat docking facilities, marina services and accommodation facilities. A suggestion to provide the latter would be to bring in a number of old railroad sleeping cars and convert them to overnight theme based accommodation and food/beverage facilities. It is suggested that these railroad sleeping cars be movable so that some of them can be transported to the Collingwood Station Complex to provide accommodation for the winter visitors. Other potential markets for accommodation facilities are fall hunters and spring fishermen.

Port Stanton: upgrading and expansion of accommodation marina facilities.

Fern Resorts: upgrading of boat docking facilities.

Establishment and viability of the proposed tour boat package is highly dependent upon the degree of co-operation between the private entrepreneurs operating the required facilities and the governmental agencies operating the water control and lock and marine railway structures along the Severn River System.

The tour boat system should also be used to promote special purpose tours such as a fall colour cavalcade on water, a history cruise when all events and activities are based upon a particular theme or a fishing excursion. Individuals or groups embarking on remote hunting, fishing or camping trips could use the tour boats as a water taxi service, and arrange for the boats to drop them off and pick them up at particular locations.

Although only one tour can leave either Port Severn or a resort per day, a number of boats can make up each tour. Hence capacity of the tour boat system is basically restricted to the capacity of enroute attractions and overnight accommodations. It is recommended that the system be built to handle about 40 to 50 people per day to ensure that the psychological effects of crowding not degrade the recreational experience.

The facilities developed for the summer boat traffic can also be used during the winter. Snowmobile trails, many of which are already in existence can connect Orillia to Port Severn using the other establishments as checkpoints or overnight stops. Once the trails are established, packaged

snowmobile tours can be promoted or special events such as an Orillia to Port Severn and return snowmobile rally can be arranged. Similarly, the infrastructure will make possible such events as a major skating/snowshoe marathon between Orillia and Port Severn.

To improve access to the Severn River System and increase tourist enjoyment of the area, construction of the Big Chute Scenic Drive is recommended when it can be demonstrated that the demand warrants the expenditures. Outlined in a general fashion on Drawing 11, the Scenic Drive connects Port Severn, Severn Falls and the Big Chute northwest to Highway 69, requiring about 6 to 10 kilometres of new road construction. At Severn Falls, boat launching facilities should be constructed to permit a car/boat interchange. Along the Scenic Drive, the major historical, natural and cultural phenomena or features are identified and interpreted either by self-guiding brochures or roadside developments.

8.3.4 Area 4 Orillia-Lake Couchiching Outdoor Recreation Area

Orillia-Lake Couchiching has been designated as an Outdoor Recreation Area within which the tourism and recreation developments, services and programming will reflect the following area development strategy:

To allow for a limited increase in visitation of the area's present market segments compatible with the "conserver" orientation and lifestyles of the area's residents through a limited upgrading and expansion of existing tourism destination resorts, facilities and attractions, and the development of significant natural, historical and cultural resources, developed on a non-integrated nodal concept basis by the private or public sectors.

a) Development Intent

The basic development intent for the Orillia-Lake Couchiching Outdoor Recreation Area is to support the growth of well-designed cottage subdivisions in appropriate locations near the shore and to encourage the development of the shore-zone for public access and day-use activities. Particular sections of the shore should, therefore, be placed under government control and developed for a range of water oriented recreation activities. Boat docking, launching and marina facilities should be concentrated either in the urban centres of Orillia or Washago, or at major destination resorts such as Fern Resort. Lake Couchiching should be promoted as a sailing area with all of the required support facilities including boat rentals, sales, outfitting and training facilities concentrated in Orillia.

b) Development Opportunities

Described in more detail in Figure 15, the proposed development opportunities for Orillia-Lake Couchiching include i) second home subdivision developments operated on either a free-hold or a time-shared basis, ii) picnicking, bathing and other day-use recreation facilities, and iii) a major yacht basin in Orillia.

As a special component of the second home/cottage subdivision proposal, it is suggested that serious attention be given to the development of a condominium trailer park in the Orillia-Lake Couchiching area. The condominium trailer park, which could also operate on a time-shared basis, should be developed for, and marketed to, the mature household or retired couple. In addition, it could have a "twin" development or similar arrangement somewhere in the "sun belt" states, reflecting the desires of many retired persons to spend summer and fall in Canada and winter and spring in the southern states.

Containing slips for at least 150 sailing craft, the design for the Orillia Yacht Basin should include launching, dry docking and repair services, storage areas, outfitting and hardware shops, pumpout systems, picnic areas, food, beverage and entertainment facilities and rescue capabilities. Appropriate industries offering such services as custom yacht design and construction, racing conversions and equipment, and specialized electronic equipment should be encouraged to associate themselves with the Yacht Basin. A training school providing beginner and advanced lessons, perhaps in association with the Canadian Power Squadron, teaching boat handling, seamanship, law, navigation, boat repair and other courses should be an integral part of the basin complex. Special events and programs promoting sailing, and the handling of class competitions and regattas should form a featured part of the services provided by the yacht basin.

Orillia is designated a Regional Service Centre and should provide the range of community services appropriate to its designation.

It is suggested that a theme park adjacent to the Stephen Leacock Home be developed to serve as a centre for summer

theatre and concerts. In winter, it could be the site of some events for the Winter Carnival and a check point for such events as cross-country ski marathons.

Events and attractions which could be promoted with residents, tourists and cottagers are the Winter Carnival, Stephen Leacock Festival of Humour, Rotary Day, the in water Boat Show and the Orillia Sportsman Show.

It is recommended that any further development of waterfront facilities in Champlain Park be essentially for residents and day-use visitors. Contiguous with the Yacht Basin and associated developments, the Park should be preserved for unstructured day-use recreational activities and the site for some special events with proven attraction for residents and visitors.

8.3.5 Area 5 Tiny Shoreline Outdoor Recreation Area

The Tiny Shoreline Area has been designated as an Outdoor Recreation Area within which the tourism and recreation developments, services and programming are intended to reflect the following area development strategy.

To allow for a limited increase in visitation of the area's present market segments compatible with the "conservation" orientation and lifestyles of the area's residents through a limited upgrading and expansion of existing tourism destination resorts, facilities and attractions, and the development of significant natural, historical and cultural resources, developed on a non-integrated nodal concept basis by the private or public sector.

a) Development Intent

In keeping with the selected development concept, the development intent is i) to support the Secondary Plans established by the Tiny Township and local municipalities in which are identified shoreline land units that are to be placed under municipal control and developed as public day-use facilities, ii) to encourage the development of well-designed cottage subdivisions throughout the area in carefully selected locations, and iii) to stimulate the growth of extensive forms of recreation including hiking, horseback riding and cross-country skiing.

b) Development Opportunities (See Figure 15)

Because the Tiny Shoreline Outdoor Recreation Area can be considered a day-use market for both the Wasaga Beach and the Midland-Penetanguishene Tourism Destination Areas, the development opportunities for private entrepreneurs centre mainly around the design and construction of cottage areas. The responsibility for providing the public day-use facilities along the shoreline, including swimming/bathing areas, picnic parks and small boat launching facilities rests primarily

with the municipal governments although concession arrangements for the provision of food, beverage and other services may be other possibilities for private involvement.

Co-operation between provincial, municipal and private land-owners is required to establish the trail system for extensive forms of recreation. Their construction should occur through the efforts of private interest groups.

c) Christian Islands

The Christian Islands, located off the Tiny-Tay Shoreline, are a reserve for Canadian Native People. While the islands have acknowledged resources for tourism development, the control of the resource use rests with the Native People and the Federal government, and therefore, the islands have not been considered within the Tiny Shoreline area development strategy.

However, from the perspective of the Tourism Development Strategy, the development of complementary facilities and uses on the Islands would be welcome. In particular, there would be benefits in the unstructured use of the shoreline for boating traffic, and limited cottage development.

8.3.6 Area 6 Wasaga Beach Tourism Destination Area

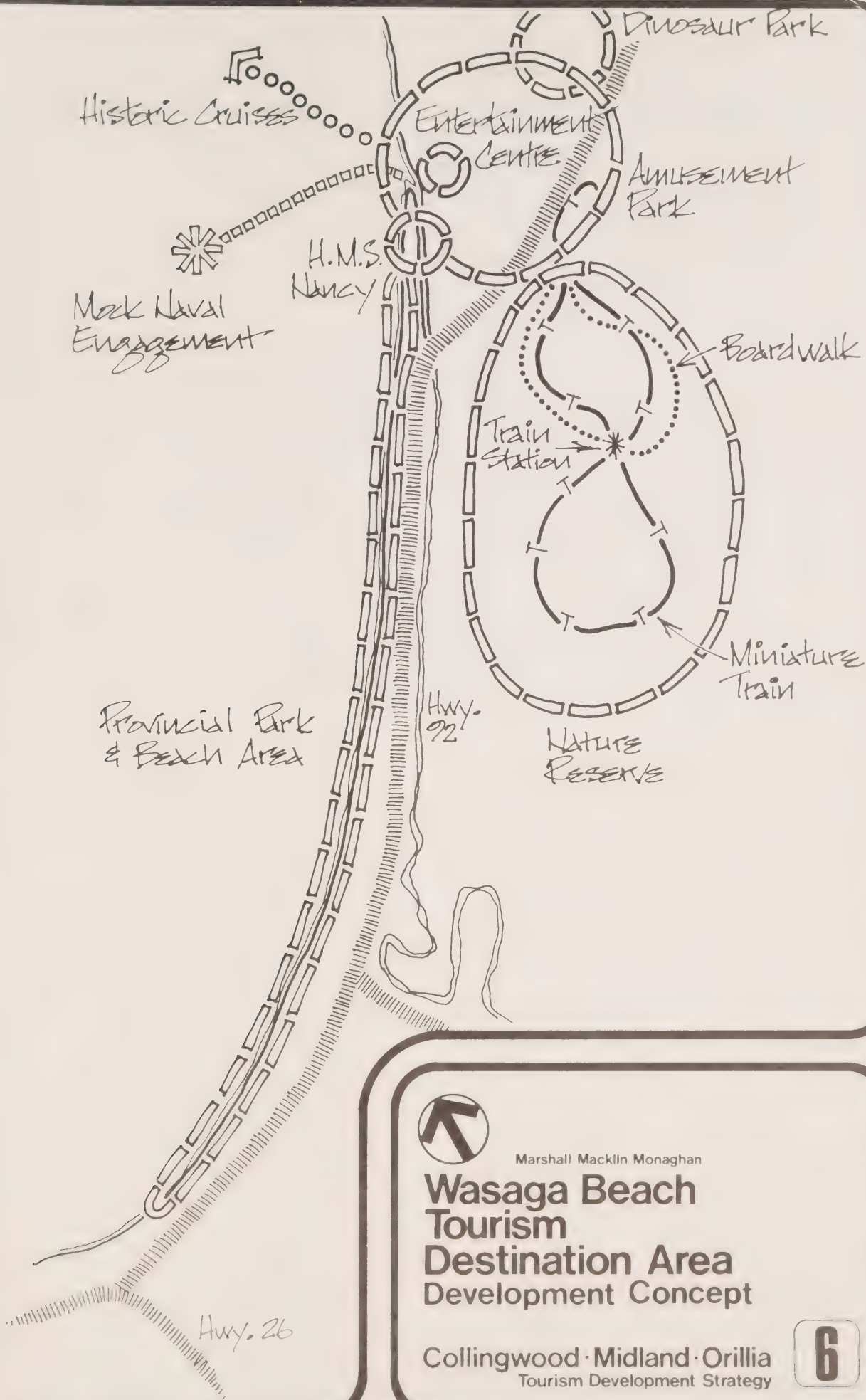
The Wasaga Beach area has been designated a Tourism Destination Area within which the tourism and recreation developments, services and programming should reflect the following area development strategy.

To stimulate day-use and short-term visitation (overnight/week-end) on an extended seasonal basis by regional (and regional U.S.) and local market segments through the development of an integrated network of one or more tourism destination resorts and complementary tourism developments offering a range of facilities, attractions, activities and events, and developed on a nodal concept basis by the private sector.

a) Area Development Intent (See Drawing 6)

Wasaga Beach serves, at present, a specific day-use market, either local (including cottages) or originating from urban centres located within a radius of 100 to 150 km. This market segment is attracted to the Wasaga Beach area by the variety of water, beach, cottage and amusement activities and facilities provided. The development intent is to accentuate this use pattern by providing a greater variety of amusement and day-use activities according to a planned program of development, rehabilitation and quality improvement that will result in planned development and co-ordination of facilities and attractions designed specifically for amusement and enjoyment, and a greater separation from other, non-compatible community developments. The design of new attractions/facilities should be such that they are capable of operation in bad weather; that is they should complement, rather than compete with the beach and water-related activities.

This development program is based upon a community zoning plan that outlines not what exists at the present time, but describes the desirable characteristics, location and association of the residential, commercial, industrial, institutional,



Marshall Macklin Monaghan

Wasaga Beach Tourism Destination Area Development Concept

Collingwood · Midland · Orillia
Tourism Development Strategy

6

Area Development Strategy

Wasaga Beach Tourism Destination Area

[illegible]

Figure 16

amusement and other zones forming the basic structure of the community. Having a least a 15 to 20 year time horizon, this future oriented zoning plan directs the gradual shift and re-orientation of the present zoning pattern to the desired zoning pattern. All of the recommended development opportunities herein described are assumed to conform with the desired zoning plan.

By creating theme communities, or communities related to a particular use, the area should enhance its market appeal to market segments beyond the traditional market for Wasaga Beach. Any further commercial accommodation development should be of a scale that is economically viable and includes a package of recreational amenities to increase the attraction for overnight visitation. The range of such accommodations should include moderately priced units and could supplement the Collingwood area's need for accommodation in the winter season.

b) Development Opportunities (See Figure 16)

It is suggested that an area of land of at least 100 acres be set aside and designated a high quality amusement park in the northeastern part of the Community. The land area should have water frontage on the Nottawasaga River and be easily accessible from the beach area proper. The basic purpose of the Park will be to concentrate a wide diversity of day-use amusement facilities into one area.

Stress should be placed upon the attraction of high-quality, family-oriented amusement activities. Hence the activities/concession that will be considered appropriate should have to satisfy three basic criteria. First, the activity must be reasonably safe; second, the activity must permit participation by the visitor; and third, it must be compatible with

the theme of the park itself - a theme that will guide the design of facilities and costumes and the selection of major entertainment.

First priority, therefore, should be the selection of a basic theme for the Amusement Park. A number of alternatives are possible. The Community could select a period like the roaring 20's or the space age, a function like railroading or the shipping trade, or a specific entertainment centre like Las Vegas, Nevada.

Depending upon the theme, specific attractions permitted in the Park can range from iron rides to penny arcades, from a tunnel of love to bumper cars, from skate board and go-kart tracks to covered trampolines. Games of all kinds, interspersed with snack bars and souvenir shops, should abound. Paddle boats, water walkers, water balloons, wet and wilds and other water dependent amusements should be available for rent and use. An old barge, moored in the river, could be used as a floating stage, from which live performances are given, and located nearby should be a large flat area for impromptu dancing. Another part of the amusement park may contain a duckboard maze surrounding a large viewing tower from which a panoramic view of the park, the beach and the community can be obtained. Although a separate entity, Dinosaur Valley should be integrated with the Amusement Park via a pedestrian circulation system. In essence, the park is intended to be a well-designed, heavily landscaped peoples place providing fun and enjoyment to many people through active and participatory activities.

The nature reserve, located south of the Amusement Park is to be connected to the Amusement Park by a miniature train and a boardwalk to provide a means of escape into relative

peace and quiet for those satiated with the hubbub and gaiety of the amusement park. Both the train and the pedestrian systems should be elevated to reduce resource impact and should lead to a central "station" where passengers can disembark or pedestrians catch the train.

Just inside the mouth of the Nottawasaga River, a wharf, alongside which the H.M.S. Nancy or other sailing vessels can be moored, should be built. An exchange program with Heritage Harbour in Midland could ensure that the H.M.S. Nancy or other full-scale replicas of historic sailing vessels be available for boarding and inspection. On board, sailors may demonstrate aspects of their craft and pastimes. Periodically, the historic vessels should take on passengers for scheduled cruises or training voyages, or may participate in staged events including naval engagements with enemy ships "hove to" off of the coast of Wasaga Beach.

Special events, competitions and celebrations are to be scheduled throughout the summer, contributing to the variety and activity of this day-use tourism destination area.

Both the design separation of facilities and uses, and the range of themes within the Wasaga Area should add to the area's ability to cater to and attract new markets, in particular some of the more affluent tourists, if the marketing program reflects these characteristics.

The commercial accommodation sector of Wasaga Beach should be upgraded and re-oriented towards its specialty markets. Well-designed clusters containing rental cabins, hostels and other forms of moderately-priced accommodation capable of handling groups, families and single individuals should gradually replace most of the hotel/motel forms of accommodation, leaving only one or two more luxurious establishments to serve the recreational and non-recreational traveller not interested in other forms of accommodation. The increased

visitation to the area during the winter by cross-country skiers and snow-mobilers should be recognized as a developing market for suitable accommodation. The retail, commercial sector of Wasaga Beach should provide the support services required for the comfort, convenience and safety of the visitor, and should be so designed that the seasonal establishments are physically closer to the commercial accommodation area and Amusement Park.

8.3.7 Area 7 Blue Mountain Four Season Tourism Destination Area

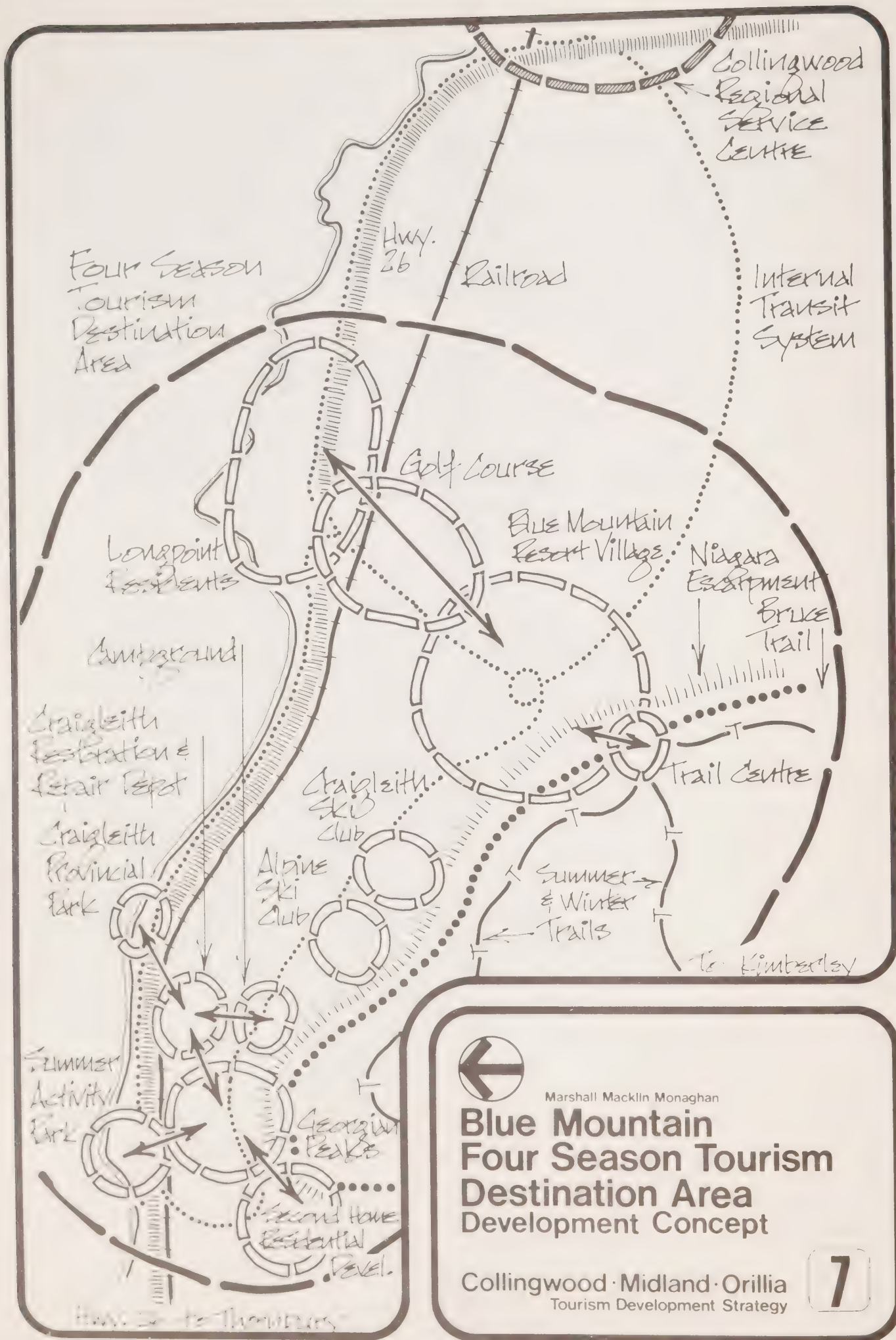
The Blue Mountain area has been designated a Four Season Tourism Destination Area within which the tourism and recreation developments, services and programming should reflect the following area development strategy:

To stimulate short-term (overnight/weekend) and extended (3 or more days) visitation on a year-round basis by provincial and regional (and regional U.S.) market segments through the development of an integrated network of tourism destination resorts and complimentary tourism developments offering a wide range of facilities, attractions, activities and events throughout the year, and developed on a nodal concept basis by the private and public sectors.

a) Area Development Intent

The development intent for Blue Mountain is to create a Four Season Tourism Destination Area in a rural landscape with a diversity of high quality accommodations and a sufficient number and variety of tourism and recreation opportunities capable of attracting regional and provincial markets throughout the year. As illustrated by Drawing 7, a system of satellite development nodes integrated through rail, road and trail linkages to the central resort village at Blue Mountain is proposed; including i) Georgian Peaks ski development, ii) a 600 to 700 unit second-home residential development close to Georgian Peaks, iii) Blue Mountain Resort Community, iv) Championship golf-course, v) the Longpoint second-home residential development and vi) Craigleith Historic Steam Train Restoration and Repair Depot. Each will contribute in a distinctive manner to the overall market attraction of the area.

Craigleith Provincial Park should also be integrated into the above developments through the railroad station at the Restoration Depot of the Historic Steam Train and the road



Marshall Macklin Monaghan

Blue Mountain Four Season Tourism Destination Area Development Concept

Collingwood · Midland · Orillia
Tourism Development Strategy

7

Area Development Strategy

Beaver Valley Tourism Destination Area

* = P.I. # DEVELOPMENT STRATEGY

To recognize the diversity of the zone's resources, have different kinds and development "options" for the variation in the goals and objectives of different sectors of the tourism industry, the wide range of lifestyles and expectations of the zone's residents, private sector development proposals, and future tourism and leisure trends through the 2010s in all different ways.

● Leadership Role/Primary focus
○ Supporting Role/Secondary focus

- Primary Activity
- Associated Activity

[illegible]

Horseshoe Valley Outdoor Recreation Area

TOP RISK DEVELOPMENT RISK

To recognize the diversity of the zone's resource characteristics and development potential, the variation in the goals and objectives of different sectors of the tourism industry, the wide range of lifestyles and expectations of the zone's residents, private sector development proposals, and future tourism and leisure trends through the application of different tourism development strategies on a nodal and corridor basis throughout the zone

variation in the goals and
time of the owner's residence.[illegible]

Figure 19

or air-bus system that should link all of the development nodes. It is also proposed that the private ski clubs - Craigleith, Alpine Village and Osler - be encouraged to enlarge their ski facilities and membership and that all facilities be integrated with the foot, bicycle and bus linkage systems.

b) Development Opportunities (See Figure 17)

i) Georgian Peaks

Georgian Peaks is proposed as a major development node with a strong day-use emphasis, offering a wide variety of both summer and winter tourism and recreation facilities.

Georgian Peaks has four chairlifts serving eight runs, a public and private clubhouse, a ski shop and ski-school. Other than privately owned chalets and condominiums, overnight accommodation at the present time must be sought elsewhere.

The development intent is to capitalize on day-use markets and to support the existing winter facilities with summer attractions capable of broadening the economic base. It is suggested that the base facilities be upgraded to a quality commensurate with the capability of the slope and the supporting day-use facilities be diversified by upgrading, expanding and building such attractions as tennis courts, swimming pool with sauna, hot-tubs and racquet-ball courts concentrated in a sports building for year-round use. The possibility for using the Peaks as a hang gliding centre should be investigated.

To augment the camping facilities available in Craigleith Provincial Park, a campground/trailer park is proposed for the Ontario Hydro lands to complement existing

planned developments in the area. Located at the foot of the escarpment, it will be screened from view from both the road and nearby residences by carefully designed plantings. In addition, the ski potential of the hydro-lands should be investigated and careful consideration should be given to the realization of this potential in a manner that will complement the facilities at Georgian Peaks.

Water-oriented recreation facilities are to be located directly across from the Georgian Peaks, along the shore of Nottawasaga Bay. Opportunities will be provided for swimming, sunbathing, windsurfing, wet and dry sailing and other water sport activities, as well as for picnicking and unstructured games such as funnel ball and pillo polo.

- ii) A proposed second-home residential development of 600 to 700 units is to be located west of the Georgian Peaks Area. Development of this nature should be reassessed within the context of the development intent suggested for the Blue Mountain Four Season Tourism Destination Area, and, if found to be a good design and well located, these second-home residential developments should be encouraged. They provide a built-in market for the tourism and recreation facilities located throughout the Destination Area. Assuming that the Sundance proposal fits the design requirements, its construction and integration with the Georgian Peak Development through ski-to and ski-from access should be fostered.

- iii) Blue Mountain Resort Community

A totally planned, pedestrian community with strict architectural controls and zoning standards, the Blue Mountain Resort Community is envisioned as the core of

the Four Season Tourism Destination Area. The community is expected to provide the diversity of commercial, residential, recreational and community facilities and services required to create a safe but stimulating and enjoyable experience for the tourist vacationing there.

The Community's commercial sector should contain a full range of retail services required by the visitor including medical and legal services, laundromat and dry-cleaning establishments, clothing, grocery and variety stores, sport stores and equipment repair services, boutiques, gifts and other specialty stores, drug store, post office, barber shop and hairdressing saloon. Persons seeking overnight accommodation should be able to rent a bed in a hostel, a room in a lodge, motel or condominium hotel, an efficiency apartment, or may be able to make arrangements to occupy a chalet or condominium for a longer period of time. Interval time-sharing programs should also be available and could be administered out of the central lodge. Food and beverage establishments should cater to a wide range of tastes and pocketbooks, ranging from fast food outlets to dining rooms and from beerhalls to intimate cocktail lounges.

Groups and associations requiring banquet rooms and meeting halls will be able to rent these facilities in the central lodge which will be capable of handling seminars, workshops and small conferences of up to 1,000 people. When demand warrants it, a separate facility designed specifically for conferences, may be required.

In addition to the high quality ski facilities available along the Blue Mountains, other winter recreational facilities offered throughout the Blue Mountain Resort

Community should include a large skating rink, cross-country ski trails, toboggan and luge runs and winter sleigh rides. An arena capable of handling regional hockey tournaments, curling bonspiels and other sports should be part of a sports complex. An active program supporting and accommodating organized junior sport groups is also recommended. Instruction and rental equipment are to be available at the relevant facilities. Warm weather outdoor recreation activities should include slide rides, water rides, wet and wilds, hay rides, horseback riding, hiking and golfing on a championship golf course, supported by a swimming pool, tennis courts, lawn-bowling and other game facilities. A continual program of professional instruction in skiing, golfing, horseback riding and other recreational activities including photography and nature observation will be available during the summer.

A serious look should also be given to the development of grass-skiing facilities, an activity which, if performed on slopes especially designed and groomed for this sport, has the potential to match downhill skiing in popularity. The development of such an attraction will contribute significantly to the viability of the entire area as a Four Season Tourism Destination Area, a viability that is dependent upon a moderate to strong market demand throughout all seasons.

A trail and tripping centre, one of the two terminal nodes for the Bruce Trail that links the area to the trail system of the escarpment, will co-ordinate the various summer and winter trail activities and supervise the marathon cross-country ski race occurring each year between Kimberly (the other trail and tripping

centre) in the Beaver Valley and the Blue Mountain Resort Community. In association with nearby stables, the trail centre will also register all parties exploring the Niagara Escarpment on horseback.

To support the resort community, between 1,500 and 2,000 resort residential units should eventually be constructed around the commercial and recreational core. Including both private homes and time-shared accommodations, the residential developments should reflect the existing capacities of the recreation facilities in place, must abide by the architectural theme and zoning standards established for the resort community and should be carefully integrated with the 18-hole championship golf-course which joins the Blue Mountain Resort Community with the second-home residential development at Long Point.

It is also suggested that the feasibility for establishing a condominium campground in which the individual sites are sold or leased on a long-term basis to prospective users be investigated. Such a facility can complement the more traditional forms of private resort accommodations.

iv) Championship Golf Course

An 18-hole golf course, designed for competition play is proposed for the Blue Mountain Four Season Tourism Destination Area.

Of sufficient quality and challenge to interest professional golfers, attempts will be made to have the golf course recognized by the major golfing associations so

that it can be included in the tour circuit. It is suggested that a 'name' golf-course architect be retained to design the golf-course to give instant credibility. There would then be a basis for promoting the holding of major golfing events or tournaments throughout the summer season. Although integrated with rural estate subdivisions and ranchettes, the design of these residential developments will be such that they do not intrude nor have a detrimental effect upon, the aesthetic quality or professional calibre of the golf course. The golf-course is a vehicle for integrating the village core area with other satellite developments and should take advantage of the topographical relief of the old shoreline.

v) Longpoint Residential Development

The proposed Longpoint Residential Development, designed in clusters around a series of sculptured ponds and water features, stretches from Longpoint Bay to past Pigeon Point and will be oriented primarily to the cottage and second-home market. The intent is that the Longpoint Development contain both modest and fairly high-priced dwellings, depending upon their proximity and association with either the golf course or Nottawasaga Bay. A small park located on Longpoint Bay and providing water-oriented recreation facilities will be integrated with the water and other landscaped features of the residential development and the golf course.

It is proposed that 5 to 10 acre ranchettes be permitted where possible, on vacant lands occurring between the major development nodes. Approved under strict land-use controls, the ranchettes will improve the overall

visual appearance of the Blue Mountain Four Season Tourism Destination Area and will serve as a buffer between the major developments.

A number of different forms of accommodation have been suggested as appropriate for the Blue Mountain Four Season Tourism Destination Area. Included are private residential developments, second-home or cottage subdivisions, time-shared accommodations of various types and traditional forms of roofed accommodation complemented by traditional and condominium campgrounds. It is estimated that at optimum development, the above accommodations should provide between 5,000 and 6,000 beds. A much greater density will result in a degradation of the overall quality of the tourism experience, a much lower density will place the viability of the proposed developments into serious jeopardy.

A dual loop public transit system connecting all of the above mentioned development nodes is proposed. One loop will circulate through the Blue Mounting Four Season Tourism Destination Area linking together all of its nodes; Georgian Peaks, Craigleith Provincial Park, the Craigleith Restoration Depot, the campground, the private ski clubs and the Longpoint Residential Development, with the central core of Blue Mountain Resort Community. The other loop connects the Community with the attractions and facilities of Collingwood including the Rail Town and Ontario Rail Museum, Blue Mountain Pottery, Cranberry Village, the candy factory, the shipyards, the major hotels and motels, the Jozo Weider Information Centre and the central business district. The public transit system will be designed

for a number of transit modes, including auto or air-bus, bicycles and motopeds, snowshoes and cross-country skis. Parts of the system will also include fitness stations, hence doubling as a jogging track and an exercise circuit.

Realization of the potential of the Blue Mountain Four Season Tourism Destination Area is doubtful until a number of prior conditions have been met. First, the complexity of the proposed project will require an innovative development vehicle incorporating the establishment of a special planning district, the formulation of resort community legislation and/or the creation of a Tourism Development Corporation having responsibility for the growth and development of the tourism industry within the area. Utilization of one or all of these methods will be necessary to resolve the special problems of the area in an integrated efficient manner. Second, a comprehensive master plan, incorporating detailed market and feasibility studies should be prepared prior to the initiation of major developments. In addition, the master plan should iterate the facilities programming, regional economic considerations, vehicles for resolving issues related to the infrastructure, and an assessment of requirements for special legislative status. Resulting in a detailed land-use zoning plan, this document should be given the status of an official secondary plan and be used as a basis for approving appropriate developments. The time required to proceed through the existing land development approval process can be reduced substantially. Third, the installation of full water and sewage services is a necessity before the development of tourist attractions, resort housing and commercial facilities can be permitted to go ahead.

8.3.8 Area 8 Thornbury: A Theme Village

Thornbury has been designated a Theme Village, reflecting in its facilities, services and programs, the following area development strategy:

To stimulate day-use visitation on a year-round basis by regional and local market segments through an upgrading and expansion of existing day-use facilities and attractions and a further development of the areas' natural, historical, cultural and other attractions, developed on a non-integrated non-nodal concept basis by both the public and private sectors.

a) Development Intent (See Drawing 8)

Located on the shore of Nottawasaga Bay and surrounded by orchard lands, the Village of Thornbury is an extremely attractive pleasant place. The development intent is to focus upon the charm and atmosphere of this small, historical, agricultural village and encourage the development of programs, events and facilities that will commemorate its agricultural and historical roots without serious detriment to the lifestyles of the local residents. The emphasis should be on the development of a small commercial core tied through a pedestrian walkway to the train station, the harbour and the marina, the historic resources of the village and to a landscaped park along the Beaver River. Easement agreements with private owners will be required before the proposal for the Walkway can be fully implemented. The Village and surrounding agricultural community should be encouraged to establish and promote fairs and festivals celebrating important agricultural events and activities.

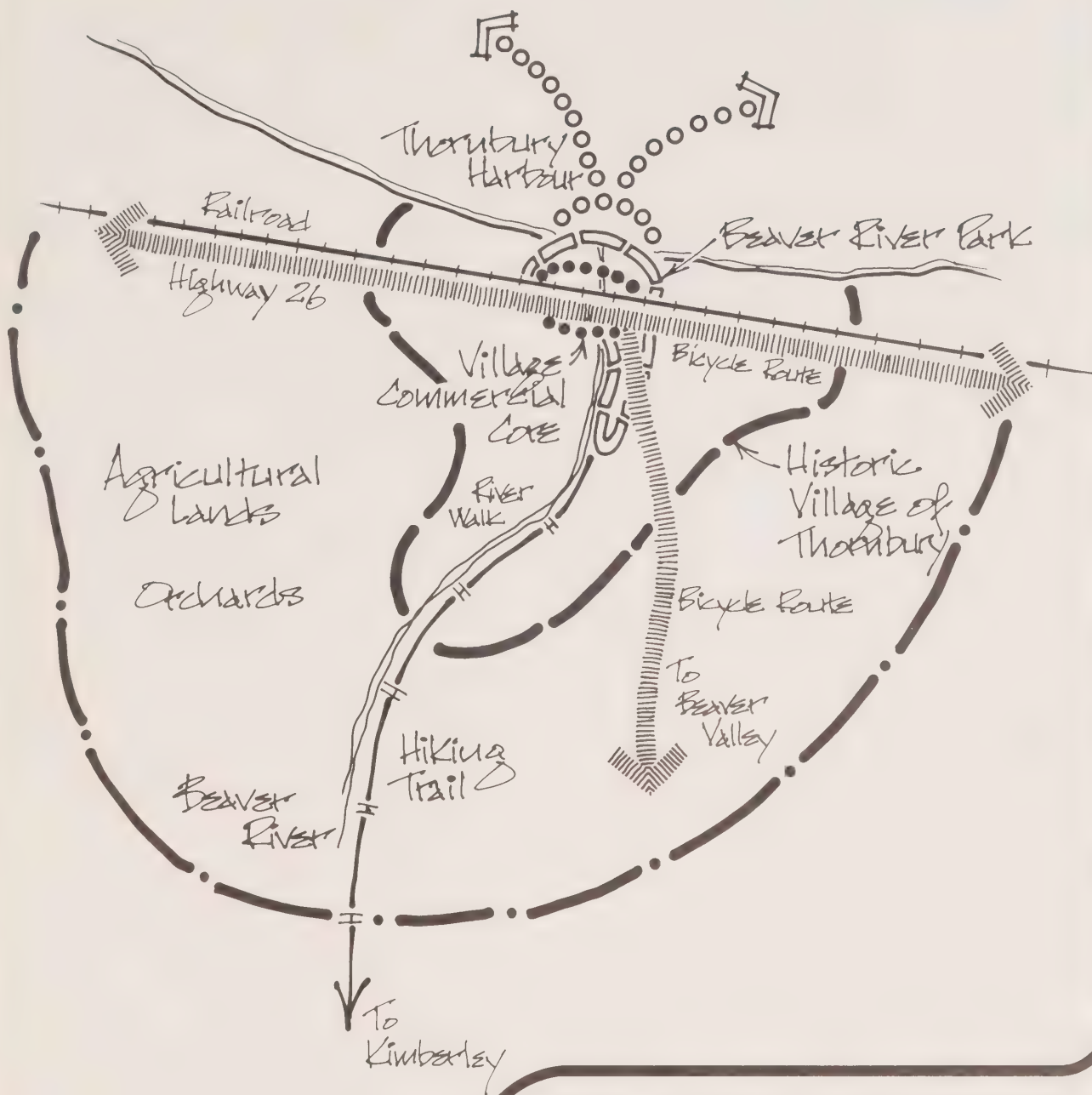
b) Development Opportunities (See Figure 18)

A number of skilled craftsmen and artisans have been attracted to Thornbury in recent years, and as a result Thornbury has been slowly developing an identity as a

source for fine art and craft products. It is proposed that this identity be fostered and accentuated through the concentration of a variety of retail outlets, the promotion of specialty craft events, the encouragement of a cottage craft industry and, possibly, the establishment of a provincial school of arts and crafts.

In an area centrally located to the railroad station, the Thornbury Harbour and the Beaver River, it is proposed that a commercial core be built containing not only some of the normal retail and commercial services required by the residents of the Village, but also a variety of small stores exhibiting the crafts and products of the local artisans and the cottage industry. Being accessible by rail will permit the passengers of the historic steam train travelling daily between Collingwood and Meaford to stop-over in Thornbury and browse through the craft shops, the antique stores and the flea market. Proximity to the proposed new marina will also provide an incentive for pleasure boaters to include a stop at Thornbury in their itinerary. The relaxation, comfort and picnicking facilities of the proposed Beaver River Park will complement the activities of the commercial core. The central point of the commercial core will be designed for pedestrian access only so that special craft displays, events and demonstrations can be held there.

As demonstrated by agricultural fairs, a number of specialty crafts ranging from quilting and crocheting to the production of working models of agricultural equipment flourish throughout many agricultural regions. It is proposed that these "cottage crafts" be encouraged through the establishment of a co-operative outlet located in the commercial core, and that the sale of these products be promoted through the special craft markets at appropriate



Marshall Macklin Monaghan

Thornbury Theme Village Development Concept

Collingwood · Midland · Orillia
Tourism Development Strategy

8

Area Development Strategy

Thornbury Theme Village

TOURISM DEVELOPMENT STRATEGY		To incorporate the diversity of the town's resource characteristics and development potential, the variation in the goals and objectives of different sections of the tourism industry, the wide range of lifestyles and expectations of the town's residents, private sector development proposals, and future tourism and leisure trends through the application of different tourism development strategies on a model and corridor basis throughout the town.										● Leadership Role/Primary Focus ○ Supporting Role/Secondary Focus		● Primary Activity □ Associated Activity																																																																																							
P108	AREA DEVELOPMENT STRATEGY	DEVELOPMENT OPPORTUNITIES	MARKET CHARACTERISTICS				TRIP CHARACTERISTICS				PRIMARY AND ASSOCIATED ACTIVITIES				PHASING																																																																																						
			DEVELOPMENT APPROACH		GROWTH MODE		PRIMARY TRIP PURPOSE		TRAVEL MODE																																																																																												
			Target and Market	Development Strategy	Primary Markets	Seasonality	Duration	Spontaneous	Planned	Family	Business	Leisure	Adventure	Religious	Medical	Other	Other																																																																																				
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100
		1	2																																																																																																		

times of the week. The atmosphere developed by the presence of the other small craft shops will be conducive to the success of such a venture.

Beaver River Park will also act as a "trail head" to a number of walkway tours and hiking trails of different lengths. Starting from Beaver River Park, the visitor will be able to take a leisurely walk along an identified course through the Village of Thornbury enjoying the historic and cultural fabric of the Village. For the long distance walker, a hiking trail, which can be used during the winter for cross-country skiing, could follow the course of the Beaver River from the Park to Kimberly in the Beaver Valley giving access to the Bruce Trail and other long-distance hiking trails. Of special interest should be the River Walk that links the core area to specific natural and cultural attractions along the lower reaches of the Beaver River. Elevated onto boardwalks, where necessary, the River Walk should connect, and provide interpretive material, at such places as the museum, the clay quarries and the apple orchards, and should identify and interpret specific natural phenomena. It should also serve as an excellent vantage point from which to watch the Beaver River Rat Race and other river events. The importance of such events as the Rat Race as day-use generators should be underscored. Local communities should be informed about and acknowledge the usefulness of such events to expose tourists to other attractions associated with their communities.

Other leisure/recreation activities should be promoted within and around Thornbury. Farm vacation programs with the feature of picking your own fruit from the orchards could be encouraged. Emphasis can be placed upon sports fishing with the encouragement, and perhaps improvement, of the Beaver River fishing capability. Careful monitoring of the

splake fishery should be undertaken. Should the fishery develop the capability and prove to have market appeal for sport-fishing, charter operations out of Thornbury Harbour could be considered. A biking route connecting Thornbury to Kimberly, Flesherton, Meaford and the Blue Mountains should be identified and designated for use as a leisure/recreation facility by local residents and as a route along which major biking events, promoting fairs, festivals and other attractions can take place.

Basic to the development proposals outlined above is the intent to foster the controlled growth of Thornbury as a "lifestyle" community focussed to a fair degree on the creative arts. To assist in the creation of such a "lifestyle" community, it is also suggested that Thornbury encourage recreation industries providing supplies and services throughout the Blue Mountain Four Season Tourism Destination Area to locate within its jurisdiction. In addition, mature households seeking retirement opportunities should be encouraged to locate in Thornbury.

Throughout the year, a number of festivals and fairs highlighting important historical or agricultural events and activities ranging from an apple blossom festival to Saturday night square dances and a cider-fest should be promoted in co-ordination with events that may occur in Meaford, Clarksburg, Flesherton or other nearby communities.

8.3.9 Area 9 Beaver Valley Tourism Destination Area

The Beaver Valley has been designated a Tourism Destination Area reflecting by its facilities, services and programs the following area development strategy:

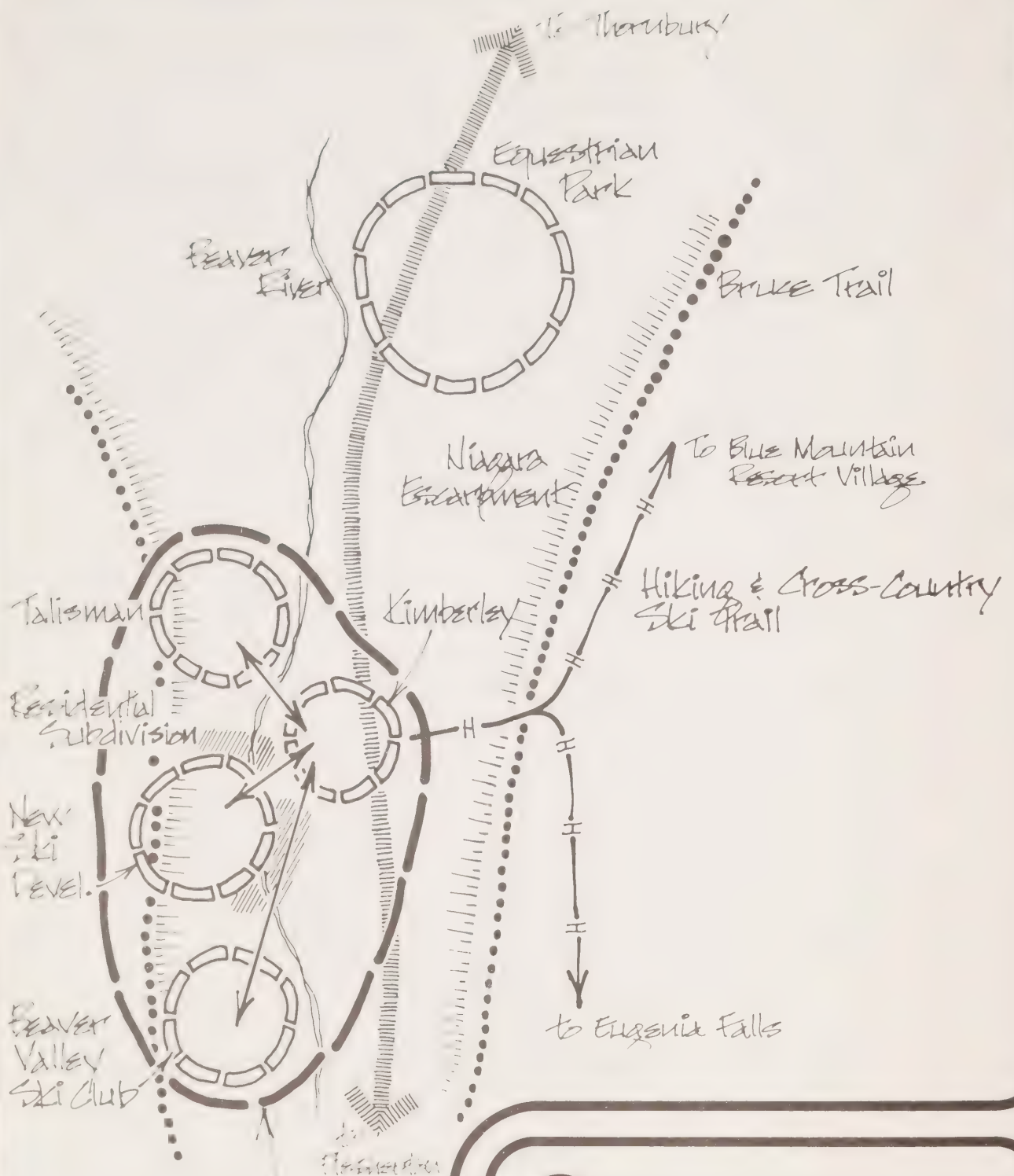
To stimulate day-use and short-term visitation (overnight/week-end) on an extended seasonal basis by regional (and regional U.S.) and local market segments through the development of an integrated network of one or more tourism destination resorts and complementary tourism development offering a range of facilities, attractions, activities and events and developed on a nodal concept by the private and public sectors.

a) Area Development Intent (See Drawing 9)

The development intent for the Beaver Valley is primarily three-fold; first, to strengthen and expand the winter sports market by developing an additional resort; secondly, to complement winter tourism by developing a well-equipped equestrian park in the Valley that provides a wide range of facilities and services for the riding, training, and care of horses; and thirdly, to create a broad market awareness of the Valley as a key tripping and entrance/terminal point into the trail system of the Niagara Escarpment. To support the proposed developments, the accommodation, retail and entertainment facilities and services presently available at Kimberly should be upgraded and expanded. Additional recreational opportunities should be provided by a network of skiing, hiking, and horseback riding trails stretching from the Beaver Valley to both Thornbury and the Blue Mountain Four Season Tourism Destination Area.

b) Development Opportunities (See Figure 19)

The basic development proposals for the Kimberly Winter Resort area are on an ascending order of complexity and can be staged to match market demand. They include:



Marshall Macklin Monaghan

Beaver Valley Tourism Destination Area Development Concept

Collingwood · Midland · Orillia
Tourism Development Strategy

9

Area Development Strategy

Beaver Valley Tourism Destination Area

[illegible]

Horseshoe Valley Outdoor Recreation Area

[illegible]

Figure 19

- i) completion of existing residential subdivisions and the investigation of the feasibility of innovative second-home residences throughout the area.
- ii) the construction of a major downhill skiing complex, as dictated by market strength, on the provincially owned lands directly west of Kimberly and the design and construction of condominiums and chalets adjacent to the new ski facilities. The private sector should be encouraged to undertake the proposed developments, which should occur in stages with design day capacity matched to market demand. The initial phase should not exceed a downhill capacity of roughly 1500 to 2,000 skiers, and should not be initiated until the upgrading and expansion of existing ski facilities have been completed. The second-home developments should also proceed in stages of roughly 40 to 50 units per stage once the Talisman infill has been completed.
- iii) the expansion of Kimberly with the upgrading and new construction of food, beverage and entertainment facilities, ski shops, equipment rentals and other commercial and retail services. The intent is not to rival Flesherton as a regional service centre, but to provide those services and facilities required for visitor comfort, use and enjoyment of the available recreation opportunities. Guided by strict building controls, the infilling of Kimberly will be architecturally compatible with existing permanent residences or rental accommodations.
- iv) the construction of a central sewage and water plant capable of servicing Talisman, Beaver Valley Ski Club, the Village of Kimberly and the new ski complex with its adjacent residential subdivisions.

Kimberly, providing support services required by the other developments, will serve as a focal point for the tripping entrance/terminal, the trail network and linkages to the Bruce Trail of the Escarpment and Collingwood. In addition, it should serve as a core for the winter resort area. Centrally located, it should provide ski-to and ski-from access to the downhill skiing area, and it should also function as a major trail centre for the cross-country ski trails and snowmobile trails that are proposed to run to Thornbury and Blue Mountain Resort Village. Skating, sleigh-rides and other cold weather recreation activities should also be available at Kimberly and in the surrounding area.

Beaver Valley is an attractive, scenic valley well-suited for the breeding, training and riding of horses. The development intent therefore, is to take advantage of this capability and build a sophisticated equestrian park down the valley of the Kimberly Winter Resort. Among the facilities available to both members and visitors should be stables and paddocks for the boarding and breeding of horses, exercise and training facilities, show rings, a track and a steeplechase course and three-day events. Courses on almost all aspects of the breeding, raising, training, growing, riding, racing and showing of horses should be given throughout the year by professional staff and regularly scheduled competitions should measure the progress made by both horse and rider. A centrally located club house, food beverage and entertainment facilities as well as lecture halls and meeting rooms, could provide opportunities for relaxation and social interaction. This development would be complementary to existing dude ranch operations and would support the further development of this market sector.

Horseback riding trails should be developed throughout the Valley, especially on Conservation lands, brought to the top of the Niagara Escarpment and extended to the Trail Centre

at Blue Mountain Resort Community. Day-trips to Eugenia Falls, Flesherton and other cultural or natural attractions could be arranged by the Beaver Valley Equestrian Park. Operators of various accommodations should be encouraged to organize package tours accompanied by trained interpretive officers that could lead visitors, either on foot or horseback, along the Niagara Escarpment, and may interpret such natural attractions as the Wodehouse Sinkhole and Karst topography, Eugenia Falls, the geological features at Hogg's Falls and attractions along the Bruce Trail. As part of these package tours, public access to Eugenia Falls should be obtained. In addition, a recreational taxi service between Kimberly, Thornbury and the Blue Mountain transit system should be developed by the operators to ensure that access to other attractions is available.

Because of the diversity of natural and scenic resources located throughout the Valley, coupled with the need to provide trained interpreters throughout the Niagara Escarpment Park System and elsewhere, serious consideration should be given by the province to the establishment of an interpretation centre/school in the Upper Beaver Valley. The tourism and recreation activities proposed for the Upper Beaver Valley will provide excellent opportunities for "hands-on" training. The school facilities could be used in the summer months for an equestrian school, as could other accommodation be used for students and their families.

The Beaver Valley should also be developed and promoted as a farm vacation area, and in conjunction with the outdoor recreation activities described above, both short and long-distance hiking trails will be available for the enjoyment of the vacationers. Where agricultural lands are marginal and topography permits their development, ranchettes should again be considered as a means through which the pastoral

landscape of Beaver Valley can be enhanced. Public access to suitable parts of the Beaver River should be provided to encourage fishing activities, and the capability of the Beaver River to provide high quality recreational fishing experiences should be promoted.

A proposed scenic drive designed for both bicycles and cars is outlined on Drawing 11. Designated as an Ecotour, interesting natural, cultural and historical phenomena should be identified and interpreted through signs or self-guiding brochures. Small nature trails leading to points of interest should be constructed and identified. Areas that could be included in an Ecotour include the Nottawasaga Bluffs, the Petun Conservation Area, Eugenia Falls, the Wodehouse Sinkholes and Karst Natural areas, Epping Lookout, in addition to the developed attractions such as the Scenic Caves, Devil's Glen, the Beaver Valley Military Museum, and the South Grey Museum and Historical Library at Flesherton.

8.3.10 Area 10 Horseshoe Valley Outdoor Recreation Area

The Horseshoe Valley area has been designated an Outdoor Recreation Area, reflecting through its facilities, services and programs, the following area development strategy:

To stimulate day-use visitation on a year-round basis by regional and local market segments through an upgrading and expansion of its existing day-use facilities and attractions and a further development of the area's natural, historical, cultural and other attractions, developed on a non-integrated, non-nodal concept basis by both the public and private sectors.

a) Area Development Intent

The basic development intent for the Horseshoe Valley Outdoor Recreation Area is to expand and diversify the warm and cold weather outdoor recreation opportunities and facilities available throughout the Copeland Forest and provided by the Horseshoe Valley Resort and the other ski developments, and in conjunction with these recreational opportunities to develop a small but sophisticated training centre capable of providing the audio-visual and space requirements of seminars, workshops and training programs.

b) Development Opportunities (See Figure 19)

For the Horseshoe Valley Area the development emphasis is placed on:

- i) the expansion of the existing winter sport facilities to the degree warranted by resource capability and market demand.
- ii) the expansion of the chalet and condominium complexes to provide the resort with a built-in market necessary to support the development of warm weather outdoor recreation facilities.

- iii) the diversification of the recreation opportunities available at Horseshoe Valley throughout the summer months, including a swimming pool, tennis courts, lawn bowling, putting green, grass skiing and other resource non-specific recreational developments.
- iv) the integration of the winter and summer trail networks developed in the Horseshoe Valley Area with those proposed for the Copeland Forest and to promote Horseshoe Valley Resort as the trail head and registry system for users of the trail complex.
- v) the development of a small but specialized training centre that can provide meeting halls, lecture rooms, audio-visual studies and other training facilities for groups of up to 100 members and to promote the training centre for use by companies or individuals providing educational services to other companies or organizations.
- vi) the development of interval time-sharing schemes using owned or leased condominiums and chalets located near the Horseshoe Valley Resort to increase the number of people attracted to the area and to provide accommodation for the users of the training centre.

As described in section 8.3.2, a major cross-country ski marathon is proposed between Orillia and Midland and Penetanguishene. The proposed course, which is built primarily on existing trails, passes through Horseshoe Valley, and the latter is designated as the major stop-over and checkpoint for the course. The intent is to promote the ski marathon as an annual event, associated with major winter festivals and activities in Penetanguishene, Midland and Orillia and to develop it into a major event drawing regional, provincial and eventually international competitors. If successful,

Horseshoe Valley Resort could become the major organizer for the event, reaping benefits from both the demand for accommodation and the development of a strong image in the market place.

Upgrading and expansion programs should be supported at the other tourism and recreation facilities located throughout the Outdoor Recreation Area, including those of Mount St. Louis, Moonstone, Medonte Mountain and Pine Ridge Ski Resorts. These facilities should be tied in with the extensive trail networks for hiking, horseback riding and cross-country skiing proposed for the Copeland Forest.

Promotional programs designed to attract visitors to the tourist and recreation developments located throughout the Horseshoe Valley Outdoor Recreation Area should emphasize their proximity to Orillia and the latter's capability to provide roofed accommodation and other support services within a convenient distance of the attraction.

8.3.11 Area 11 Historic Steam Train Tourist Attraction (See Figure 20)

Because of the area's historical link with steam railways, a number of major attractions commemorating the history of steam trains are proposed for development along the railroad from Collingwood to Meaford. Based to a degree upon the proposals submitted by the Ontario Rail Association to the provincial governments, these developments are described at this time to allow for their incorporation into the development proposals and opportunities recommended for Blue Mountain, Georgian Peaks, Thornbury and Meaford.

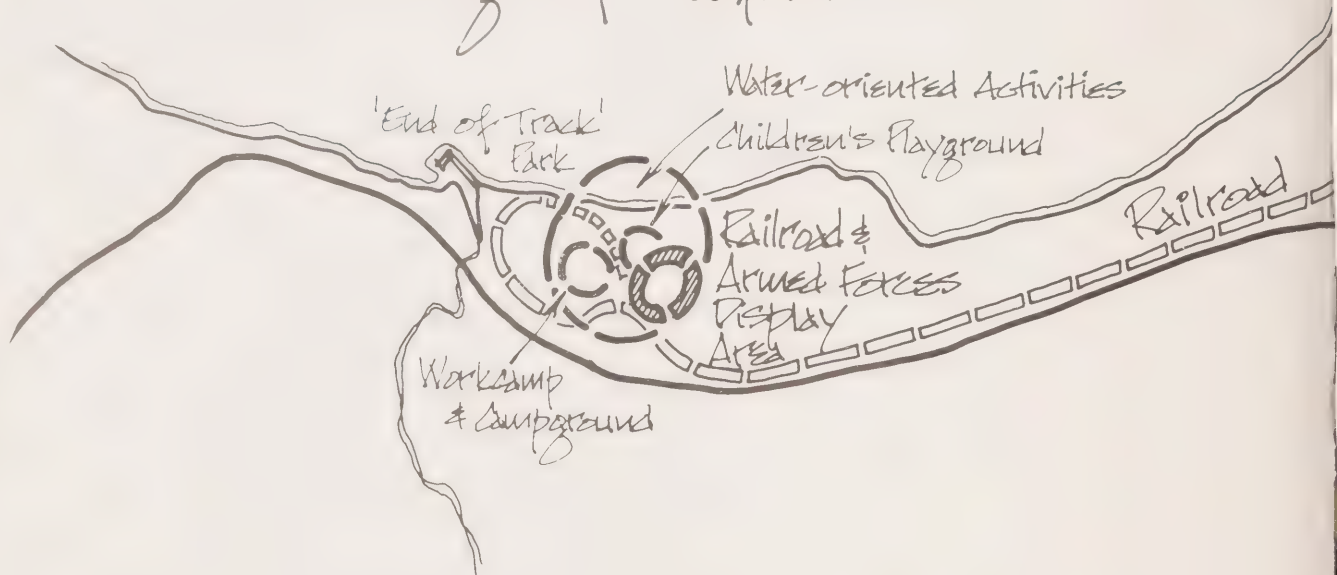
The historic steam train tourist attraction will have the following major components: Collingwood Rail Town and Museum, Craighleith Restoration and Repair Depot, Thornbury Station and End-of-Track Park in Meaford. Drawing 10 illustrates the relationships of the above attraction nodes and suggests their major characteristics.

a) Collingwood Rail Town and Museum

It is proposed that the Collingwood Rail Town and Museum be composed of three major activity areas; the Rail Town with its historic streetscape, a train station serving both as a train depot and a museum, and the passenger platforms containing rolling stock converted to elegant dining rooms, entertainment facilities and accommodation.

It is suggested that an entire streetscape from a historic railroad town be recreated along a main street leading to a large plaza in front of the train station, and that a variety of commercial and retail activities be carried out along that street. Stores selling railroad memorabilia and models could share the street with saloons, art galleries, bookstores, cabarets, old fashioned variety stores, ice cream parlours and coffee shops. An old post office could be set up that

Village of Medford





Marshall Macklin Monaghan

**Historic Steam Train
Tourist Attraction
Development Concept**

Collingwood • Midland • Orillia
Tourism Development Strategy

10

Area Development Strategy

Collingwood to Meaford Historic Steam Train Tourist Attraction

[illegible]

Figure 20

would handle special mail, have a special cancellation stamp and send and receive telegrams. Modern service functions, including fire protection, security and administration could hide behind appropriate facades. Periodically, old fashioned street and square dances could fill the street rivalling, in sheer exuberance and volume, real-life celebrations.

The train station, reflecting through architectural style and interior design, the charm and character of the bygone era when steam was King, should contain the museum as well as catering to the passengers travelling via the steam train to Craighleith, Thornbury and Meaford. All of the fittings, furniture, handbills, decor and costumes of the dispatchers, porters and train attendants should be in keeping with the historic railway theme. Accessible from both the plaza and the passenger service depot, the Ontario Rail Museum may portray through audio-visual techniques, didactic displays and working models, the growth, development and decline of steam rail-roading in Ontario. Emphasis should also be placed upon the descriptions of the subcultures that flourished during, and the lore that remains from the hey-day of steam.

Adjoining the train station, and partially covered by the stations large overhang, should be wide passenger platforms jutting away from the station proper. Coaches and other rolling stock should line these platforms. Those nearest to the active passenger depot are to contain elegant dining and entertainment facilities in a decor reminiscent of the luxury dining and club cars of the early days. Other coaches should cater to those seeking quiet, more intimate surroundings. Farthest away should be located a number of trains whose coaches have been converted into overnight accommodation ranging from individual berths and roomettes to luxurious suites.

Although some or all of the trains can be moved, the entire area, including the platforms, should be landscaped to create a harmonious whole, and to ensure that the various activities occurring within or near the train coaches will not intrude upon each other to an excessive degree.

Access to the Rail Town and the Ontario Rail Museum should be integrated with the Jozo Weider Information Centre. Coupled with its more general roles of information distribution, reservation referrals and visitor direction to other existing tourism and recreational attractions, the Centre should provide a valuable and much needed visitor orientation and control function.

b) Craigleith Historic Steam Train Restoration and Repair Depot

A fully operating restoration and refitting shop should be located along the railroad near Craigleith Provincial Park. Designed to maintain the rolling stock in use, the shop could also have the capability to restore various types of steam railroad equipment, from pullman coaches to track layers and from pile drivers to rotary snowplows. Although the visitor may be kept away from the working part of the shop, live demonstrations and audio-visual presentations may explain the intricacies of the processes involved in the restoration and reproduction of steam equipment.

A static display of engines, coaches, box cars, and other railroad equipment should be located adjacent to the shop; while scattered throughout and around, for atmosphere and visitor enjoyment, may be watertanks, wood piles, wheels, axles, and boilers, and other railroad paraphernalia. Also on site could be a small reproduction shop that might reproduce small items of railroading memorabilia for sale to the

visiting public and shops in Rail Town. Food and beverages should be served in a coach or caboose from which a general view of the activities occurring in the refitting shop can be enjoyed.

Both the historic steam train and the proposed sports train from Toronto and Barrie should stop at the railroad station built in conjunction with the refitting shop. Passengers disembarking from the sports train will be transported to their various destinations throughout the Blue Mountain Four Season Tourism Destination Area via the internal transit system.

c) Thornbury

The existing railroad station should be refurbished to reflect the historic steam train theme, and a pedestrian walkway should tie the railroad station to Thornbury's commercial core and the landscape park along the Beaver River, and Thornbury's Harbour and Marina.

d) Meaford "End-of-Track" Park

Proposals for the "End-of-Track" Park, to be located just east of Meaford, include the development of a railroad work-camp and its associated equipment, a display area expressing the role that the railroad played in the history of our armed forces, a children's play area built around railroad equipment, a campground containing both group and standard facilities and an open, landscaped area designed for day-use activities and containing such facilities as gazebos and a band shell for performances and special events. Given the mix and diversity of the proposed developments, theme and/or activity areas should be separated visually as well as physically.

Surrounding the rail laying equipment and material normally found at the end of a track that is being built, should be scattered groups of sidewall tents on wooden platforms representing the usual accommodation provided to railroad workers. It is suggested that these could serve as camping facilities for organized groups, thereby using the visitors themselves to animate the historic setting. An indoor/outdoor interpretation centre could, through displays and dioramas, interpret the pioneer days of railway construction.

Part of the Park should contain an outdoor display area of specialized railroad equipment developed for use by the armed forces either to transport its heavy machinery and weaponry or for other special purposes. Self-guiding booklets and free standing signs should be available to interpret these specialized roles or functions to the visitor. Adjacent to the display area should be a picnic ground and a children's play area. In the latter, odd pieces of railroad equipment could form the structural elements permitting the children to explore and fraternize to their hearts content.

The open landscaped area should stretch to the water's edge and, where feasible, the waterfront should be developed for swimming, sunbathing, wind-surfing and related activities.

Together, the proposed railroad developments linked by steam from Collingwood to Meaford have a high inherent capability for extending the tourist season into both spring and fall. Communities located along this route should capitalize on this capability by scheduling special spring and fall fairs and festivals that will augment the rail attractions and persuade the tourist to travel a little earlier or a little later in the season than originally planned. A changing variety of cultural events, even if only of local significance,

could contribute significantly to the colour, excitement and atmosphere that are the basic ingredients of successful and viable tourism developments.

The development and operation of the historic steam train and the associated tourist attractions will depend for success upon the involvement and co-operation of many agencies and individuals. Not only are the proposals capital intensive, they also require a great deal of expertise and scarce equipment. To integrate these sources and requirements, an organization such as a Tourism Development Corporation or the Ontario Rail Association should be formed or persuaded to oversee the entire project from plan development to facility operation. Organizations such as the Canadian National Railway, Canadian Pacific Railway, the Canadian Armed Forces and the National Museum should be contacted for technical and financial support and for the donation of rolling stock and memorabilia.

No doubt, the Historic Steam Train Tourist Attractions would have the potential to attract a large number of visitors. Assuming a maximum of about 100 operating days per year, it is estimated that the train itself with four coaches per train can handle about 400,000 person round trips per year. It is also estimated that this capacity would be utilized to the fullest. The estimate of 400,000 person trips is based on estimated visitation to the communities linked by the Historic Steam train independent of the Train Attraction as well as visitation generated by the Attraction. As is suggested by the conceptual relationships and physical location of the elements, Collingwood, Thornbury, the Craighleith Depot and Meaford are the development nodes; they are attractions in and of themselves and have specific complementary market appeal for both the communities in which

they are situated and the Steam Train Attraction. The link, which strengthens the market appeal of the area and the nodal developments, is the Historic Steam Train Tourist Attraction.

It should also be noted that the design of the total Attraction lends itself to phased development; for example, the Train could operate between Collingwood and Thornbury, and/or between Collingwood and Craigleith Provincial Park prior to development of the Meaford component. Decisions could also be made with respect to seasonal operation of the train. If so desired and demand warrants, the Collingwood station and the Craigleith Restoration Depot could be open on a year-round basis. One of the advantages of the latter option is that key staff members are guaranteed full-time employment.

Because of the complexity of the project and the potential involvement and contribution of many agencies, organizations and individuals, the financial feasibility is not as easily determined. The fees charged at the various attractions, the arrangements made with commercial establishments and concessionaires, the sales of memorabilia from the reproduction shop and other outlets, the cost of operating rights and permits, the sales of movie rights, and other important considerations affect feasibility. The implementation of the other sport and tourist facilities recommended for the Blue Mountain Four Season Destination Area will also have a strong bearing upon the viability of the entire project.

8.4 Tourism and Recreation Service Centres

The Tourism Development Definitions provided in Section 8.3.3 outline the type and level of tourism support services expected in local, regional and provincial service centres. Within the context of those definitions and expectations, the urban areas located throughout the Collingwood-Midland-Orillia Tourism Development Zone have been assigned the following roles.

8.4.1 Provincial Service Centre: Barrie

Barrie, because of its strategic location athwart the major provincial highways penetrating the Tourism Development Zone, has been designated a provincial service centre and is also the Regional Gateway for the zone. As such, it should offer a complete range of services to the touring public, including, among others, a variety of types and qualities of accommodations, food and beverage facilities, a wide range of retail and other related services, gasoline and automobile service facilities, legal, medical and other community services, and a provincial tourism information centre. In light of its designation, Barrie's facilities and services should be evaluated in conjunction with the plans for Kemperfelt Bay so that any necessary upgrading of existing facilities and services is complementary to other planned development.

The downtown revitalization and redevelopment plan being prepared along the shores of Kemperfelt Bay from downtown Barrie to Minet's Point incorporates the range, accommodation, recreation and entertainment facilities appropriate to a provincial service centre. Hence the Tourism Development Strategy for the Collingwood-Midland-Orillia Tourism Development Zone encourages the continuation and implementation of these redevelopment plans, but would make the following suggestions.

The sports complex, the convention facility and the hotel should be integrated into one facility built on the waterfront in a resort type setting in a location where it can be serviced by the railroad but is not denied direct access to the shorezone by railroad right-of-ways. Marketed to potential visitors of the theme park - Canada's Wonderland - as a suitable facility for extended stays, the resort complex should have a strong waterfront orientation with unimpeded access to a full-service marina, other boating facilities and related shoreline activities.

During the summer its major clientele could be the "Wonderland" visitor, especially if programs are developed that will make it easy and convenient for hotel patrons to travel between the two developments. It is suggested that Barrie take the initiative to appeal to "Wonderland" visitors on the basis of moderately priced accommodation in a resort setting. With the Wonderland as a primary attraction, Barrie should be encouraged to develop secondary regional attractions such as 'wet and wild' water based attractions, game farms and agro-machine museums. Barrie is also in a strategic position to service and package day trips to the Collingwood/Blue Mountain area and the Midland-Penetanguishene area. In the shoulder seasons and during the winter, the convention facility designed to attract smaller conventions, and the sports complex, capable of supporting such organized events as hockey tournaments, will support the 200 plus room hotel. The Barrie race-track, ice-fishing, Kempenfest and other urban attractions will assist in keeping the complex fully occupied, and it is conceivable that future market demand will warrant the development of additional hotel facilities along the waterfront.

In view of the rather extensive redevelopment of the waterfront envisioned for the City of Barrie by its industrial commission, it is strongly recommended that a comprehensive waterfront development plan, containing not only concepts but detailed market analysis and feasibility studies, be prepared and integrated with the overall development plan for the City of Barrie.

In so doing, the City can examine such diverse elements as the possibility of rail access from Barrie's waterfront to Canada's Wonderland, waterfront development as opposed to further transient highway development, the expansion of marina, boating and other water-oriented recreation facilities along Kempenfeldt Bay, and, as a result, can offer the citizens of Barrie a high-quality, multi-activity leisure and recreation park system that will enhance the image of Barrie as a good place to live and work.

8.4.2 Regional Service Centres: Orillia, Midland, Collingwood and Flesherton

Each of the above regional service centres are to provide the range of tourism support services necessary to permit the development and use of the tourism and recreation opportunities recommended for the area. The exact mix of facilities and services available will differ somewhat depending upon the orientation of the area's tourism industry (i.e., land-based vs water-based, or natural vs man-made). Each regional service centre may also have particular tourism attractions that complement the opportunities offered throughout that portion of the Zone, antiques in Flesherton, ship yards and candy or pottery factories in Collingwood, the farmers' market in Orillia and industrial diversity in Midland, but each serve to stimulate and co-ordinate the tourism industry of the adjoining area. The key to further development of the regional service centres lies in upgrading the waterfront facilities, generating day-use traffic and retail traffic related to the tourism industry in the community, and having the community responsive to the benefits of the tourism industry.

With the latter requirements in mind, it is recommended that in each of the above mentioned regional service centres a local organization be created to co-ordinate the development, management and promotional activities of the area's tourism industry. Operating out of existing or new regional information centres,

they will assist not only the tourism industry in refining its goals and development programs, but will provide the tourist with a central information and registration system covering the major tourism facilities, programs and events available throughout the area.

Orillia is the second largest urban centre in the Zone with a number of attractions for day-use tourists, cottagers and residents. It has more potential to improve the accessibility of its waterfront to auto/bus travellers and promote the considerable sailing and boating advantages of the area. Orillia should be encouraged to tie its tourism accommodation sector to the Horseshoe Valley. Because of its accessibility, relatively well developed infrastructure combined with water-associated opportunities, Orillia should be encouraged to take advantage of the growing market for retirement-resorts.

All the designated centres except Flesherton, have the basic community infrastructure in place to function as a regional service centre. Flesherton will have to be assisted in upgrading its sewer, water and other utility systems. Yet, its strategic location with respect to the Beaver Valley and the provincial highway system in that area warrants its development as a regional service centre and the required assistance to upgrade its basic services.

Aside from the regional service function described above, Flesherton has other cultural attractions that should be accentuated. Because a number of its establishments focus on the display and sale of a wide range of antiques, Flesherton is becoming known as the "antique" centre where rare, hard to find items and specialty items may be obtained. It is suggested, therefore, that through the encouragement of specialty shops located in historic or even restored buildings, and the promotion of special events, demonstrations and entertainment facilities

built around the theme of antiques and antiquity, be emphasized and promoted. Strict architectural controls should be put in place to ensure the retention of the historic fabric of Flesherton, and eventually, when market demand warrants it, major restoration of part of Flesherton could be undertaken to provide the appropriate atmosphere for its cultural activities.

Collingwood is already heavily dependent upon tourism and related services. Collingwood, therefore, should seriously explore the option of becoming a leisure/recreation based community. Under this option, Collingwood, in co-operation with the surrounding townships and their tourist attractions and recreation amenities, makes a deliberate effort to upgrade, expand and diversify its leisure and recreation services that are provided to the residents, and through the promotion of these social amenities, entice industries to locate in the Collingwood Industrial Park. Collingwood would, therefore, become known as a very good place to live, which then becomes a definite asset to industries that are willing and capable of moving away from large market centres. Also under this option, developments like Cranberry Village with its attendant recreation amenities, become highly desirable because they form one mechanism through which this option can be fulfilled. Hence, they should be fostered and integrated with the recreation and leisure facilities developed by the community.

8.4.3 Local Service Centres:

The following communities have been designated local service centres offering essential services to the tourist including food, gas and auto repair services and medical, police and other community services.

Honey Harbour	serving boat traffic
Severn Falls	serving boat, rail and road traffic
Port Severn	serving boat and road traffic
Port Stanton	serving boat traffic
Coldwater	serving road traffic
Elmvale	serving road traffic
Stayner	serving road traffic
Meaford	serving road, rail and boat traffic
Thornbury	serving road, rail and boat traffic

Particular local tourist attraction are identified and interpreted in local information centres.

8.5 Trail Systems and Travel Corridors

8.5.1 Trail Systems - Trail linkages are important elements for integrating attractions, nodal developments and communities throughout the Zone.

The planned or existing trail systems are depicted on Drawing No.11. The Tourism Development Strategy for the Collingwood-Midland-Orillia Zone recommends their retention and expansion.

a) Equestrian Trails

The elaboration of the Zone's equestrian trail system should proceed along two complimentary lines; trail expansion and program development. First, the equestrian trail system should be extended to the Beaver Valley Equestrian Park to connect that facility and the valley equestrian trail system onto the Great Pine Ridge and Heritage Trails. Overnight accommodation facilities either in the form of primitive trail camps, or located at ski resorts, campgrounds, private farms and commercial stables should be provided.

Program development should also occur. First, an information program that outlines the aims of such an organization as the Ontario Trail Riders Association should be initiated to

inform local residents throughout the zone of both the financial and recreational benefits to be derived from this system and secondly, an educational program directed at the users of the trail about their responsibilities and the land-owners rights should be instigated and made a mandatory condition for membership. Membership, whether permanent or seasonal, in a Trail Riders Association should be a prerequisite for trail use.

Substantial growth in either the trail system or its use presupposes that responsibility for developing and policing the trail system is in the hands of one organization and that there is a great deal of co-ordination and co-operation between this organization and land-owners, private entrepreneurs and other individuals and organizations.

b) Hiking Trails

No major additions, except for access to proposed local trail networks, or to the long-distance hiking/backpacking trail system is proposed. Again, the primary problem is not related to trail development, but to trail use and user control. Better educational programs and policy measures should be put in place, similar in form and purpose as those recommended for the equestrian trail system.

c) Cross-Country Ski Trails

Cross-country trails permeate the Collingwood-Midland-Orillia Zone especially near urban areas and winter resorts. Being primarily of a local, day-use nature, they are not specifically designed for long-distance touring or competitive events. Hence a number of longer distance trails are proposed. A cross-country trail designed for competition as well as leisurely touring is proposed between Thornbury, Heathcote, Kimberly, Blue Mountain Resort Community and Collingwood.

Permanent timing devices should be built along sections of the trail to permit the holding of competitive events, such as the marathon race between the Trail Centre at the Blue Mountain Resort Community to Kimberly, or to permit the skier to compete with himself.

Similarly, a permanent marathon cross-country ski trail is proposed between Penetanguishene, Midland, Horseshoe Valley Resort and Orillia. Built along existing trails wherever possible, the trails variability and challenge would be of such quality as to be able to attract national and international competitors to compete in annual or other special events. A permanent trail centre should be located at Horseshoe Valley Resort to organize and co-ordinate the marathon events. If co-ordinated with major winter festivals at Penetanguishene, Midland and Orillia, the annual cross-country ski marathon could have the potential to become a major winter attraction.

d) Snowmobile Trails

Existing or planned snowmobile trails are identified on Drawing 11. One major addition is recommended, subject to a terrain suitability study, along the Severn River from Washago to Port Severn specifically designed for snowmobile rallies. The return leg of the rally would parallel existing trails. Checkpoints, timing devices, obstacles and "confusion" trails should be built into the course to provide high quality competition.

The major problem facing the snowmobile association are similar to those faced by other major trail users - both hiking/backpacking and horseback riding. An organization should be designated that has the major responsibility for trail development and use, and with which other agencies and individuals could deal to resolve differences or establish

-

policies and co-ordinate programs. In addition, snowmobile associations have to combat a major image problem, and a concerted, directed effort by a co-ordinating agency is required to improve that image, and the resultant acceptance of snowmobile tourism as a legitimate recreational activity.

8.5.2 Travel Corridors

As outlined on Drawing 11, Highways 400 and 11 have been designated as provincial travel corridors traversing the eastern portion of the Collingwood-Midland-Orillia Tourism Development Zone. Regional Travel corridors link the Tourism Development Areas with the provincial corridors.

The quality of access to the defined Tourism Development Areas is determined, therefore, by the location and condition of the Regional Travel Corridors. Hence the intention of the Ministry of Transportation and Communications to study or improve the Regional Travel Corridors in the following areas is endorsed: Highway 400 and Interchange 26/27, Highway 27 Waverly to Midland, Highway 11, south of Painswick, study of Highway 93, study of a by-pass road around Collingwood. In addition, a major upgrading program of Highways 27, 26 and 24 is recommended by this study. The primary focus of the upgrading program should be to by-pass a number of small settlements, to reduce the frequency of sharp curves and to improve route and destination identifications. Long-term plans should include the upgrading of the access route to Wasaga Beach and the development of a loop road system linking Severn Falls and Big Chute to Highway 69.

Passenger rail service to major urban centres throughout the Zone is intermittent or lacking. It is, therefore, recommended that a sport train service to operate between Metro Toronto and the major Tourism Destination Areas be investigated.

It is recommended that the sports train operate from Metro Toronto to Georgian Peaks, connecting Barrie, Angus, Stayner and Collingwood with the Historic Train station near Georgian Peaks. The sports train could serve not only those individuals planning to use the various summer and winter sport facilities located throughout the Blue Mountain Four Season Tourist Destination Area, but could also serve as a commuter train for the substantial number of second-home residential subdivisions.

8.6 Conclusions and Recommendations

The consultant's conclusions and recommendations with respect to the general development guidelines are presented below in five broad categories; general considerations and caveats, management of the tourism industry "system", markets and marketing, and the role of the public and private sectors.

8.6.1 General Considerations and Caveats

- a) An industry organization review should be undertaken in order to develop a structure and program for the Travel Association to meet the changing requirements of the industry.
- b) Senior levels of government have established financial assistance programs to aid the tourism industry. These programs, in particular the federal government's DREE program, should be further evaluated to ensure that the scope of the programs, and the criteria used to determine the eligibility of proposals, and the level of assistance provided are appropriate to the requirements of the industry; and industry representatives should become aware of the scope of the programs.
- c) During the design and establishment of proposed developments, the characteristics of the existing tourism plant should be evaluated carefully. The recommended intent is to incorporate those existing quality facilities that have the potential through selective upgrading and expansion to contribute significantly to the economic viability of the Tourism Development Area. Marginally viable, poorly-sited and non-appropriate facilities, including accommodations, are not included in this selective upgrading program, nor are they recommended for financial or other forms of governmental assistance.

- d) It should be noted that there are social, environment and resource limits to the carrying capacity for tourism development and the bulk of quality resources have been previously developed. Therefore, major new developments should be man-created rather than resource dependent and land intensive rather than land extensive; nodal tourism development is recommended to minimize detrimental social and environmental effects and to maximize economic impact.
- e) It should be recognized that carrying capacity caveats apply to resources for cottage or second-home development and local recreational uses which are competing markets for tourism. A balance has to be struck among tourism, local recreation and second-home ownership development.
- f) The proposed tourism development strategy has been planned with a long term horizon of roughly 20 years. Hence all proposals and recommendations should be reviewed at least every five years or when the situation warrants, to assess their continued suitability to local, zonal and provincial requirements.

8.6.2 Management of the Tourism Industry System

It is within the concept of tourism as a system that the following recommendations are made. Although the essence of the development strategy is to integrate all parts into a coherent system, for convenience of discussion, the system is arbitrarily divided into the elements of development nodes, events and attractions, communities and service centres, and transportation.

a) Development Nodes

- i) The tourism industry should emphasize and make efforts to concentrate diverse facilities, attractions, events and services into development nodes or consolidated destination areas.

- ii) The principle of building and integrating complementary rather than competitive facilities should be respected within and between development nodes or clusters.
- iii) The emphasis on development nodes will enhance the tourism operator's ability to meet the sophistication and expectations of the tourists to absorb the anticipated increase in the cost of operating accommodations, travel services and resort facilities, and to retain highly skilled staff.
- iv) Rising energy costs will probably be the single highest factor in rising travel costs with a consequent upswing in single destination vacations, group travel, low-cost package tours, and vacations that do not involve the extensive use of private automobiles. Hence, concentrated destination areas will be required to accommodate these trends.
- v) The development nodes should have sufficient size and diversity of opportunities to create a "critical mass" having the capability to create a strong market identity or awareness in the target market segments. Below that size and diversity the operation will be dependent to a significant degree upon the availability and quality of nearby attractions, and will be more vulnerable to existing or new competing intervening opportunities.
- vi) Development cluster or tourism destination areas should contain a variety of accommodations, from low-cost to luxury, from isolated to group accommodation to cater to the diversity of the market place. The form and style of these accommodations and related services should be in keeping with the goals and objectives established by the area development strategy for the relevant Tourism Development Area.

- vii) Attempts should be made to establish a mix of activities and attractions in any development cluster that include elements of great appeal to the local resident user groups regardless of season. The revenue generated from the local residents would assist in the retention of economic viability.
- viii) Within the development clusters, or in association with them, emphasis should be placed upon the linking of "single season" activities in a consecutive sequence so that a year-round operation can be maintained. Attractions and programs that extend the tourist season into the shoulder or off-season should be encouraged, and they should not be limited to resource specific types of tourism or recreation opportunities.
- ix) Specialty markets are very significant for the tourism industry, but there are a number which cannot be accommodated by development clusters. However, these special types of tourism and recreation opportunities should be developed and integrated through programs co-ordinated by the development clusters, and they should be recognized as an integral part of the attraction of the zone in the marketing and promotion efforts undertaken to attract the desired market segments.
- x) The Heritage Conservation Branch and the Parks Branch should be encouraged to develop their historical and natural resources throughout the zone, complementary to the themes and guidelines established by the Tourism Development Strategy for the Collingwood-Midland-Orillia Zone. Where possible, these developments should include facilities suitable for package tour use or for extended-stay visitation.

- xi) Each development or development node should exemplify a theme that guides and unifies the architectural styles of its facilities, complements the area in which it is located and contributes to overall market identity.

b) Events and Attractions:

- i) The events and attractions promoted throughout the zone should be evaluated to determine and improve market suitability, and to identify means through which their scope can be enlarged and quality improved to broaden market appeal.
- ii) The capability of public attractions and events to act as a market generator for other private ventures, in particular, commercial accommodation, should be recognized and accentuated by both the public and private sectors.
- iii) Both public and private sectors should be cognizant of, and plan for, the sudden expansion of particularly successful events. (For example, the Mariposa Folk Festival came to be viewed as a liability by the Orillia community and consequently moved to Toronto Island).
- iv) As far as possible, events and attractions should be so designed that visitors can and are encouraged to participate.
- v) Unique events and attractions are necessary to compete with intervening opportunities and should be supported with continuous promotion.
- vi) Events should be scheduled throughout a Development Area or the Zone to complement and support each other, and should be used to generate markets for the shoulder or soft season.

- vii) Events and attractions should strive and should be used to tie separate communities together.
- viii) To the degree feasible, events and attractions should be so organized that there are indoor programs to supplement outdoor activities, both to extend the operating season and ensure some visitation during days of bad weather during the peak season.
- ix) Events and related programs should be "nested" so that a visitor has the option to attend specific activities or stay throughout the event.

c) Communities and Service Centres

- i) Communities should recognize the increasing importance of the community atmosphere and character as a travel generator. The residents (or "hosts") and their lifestyles are as much an attraction as other special features. Efforts should be made to enter into programs that assist a community to upgrade its image and maximize its contribution to the local economy.
- ii) It is absolutely necessary to obtain the involvement in and commitment of the community to the tourism industry. Tourism should be considered in the official plan as a separate and distinct industry, contributing to its economic and social well-being and hence should be able to obtain its share of the community's land, labour and financial resources.
- iii) A municipality planning to support and promote tourism should adopt one or more special themes consistent with the objectives of the Tourism Development Area Development Concept but distinct to the community itself.

- iv) Local tourism organizations should be assisted with information programs directed to the residents of local and associated communities to make them aware of the benefits of tourism and enlist their support to create an enjoyable ambience for tourists.

d) Transportation

Roads

- i) There is a strong need for improved access to both the Four-Season Tourism Destination Area, and the Tourism Destination areas. Highway 26 to Collingwood and the Blue Mountain Four-Season Destination should be substantially improved through selective widening, and straightening and the construction of by-passes around small villages and hamlets. Access to Midland should be similarly improved by the upgrading of Highway 27.
- ii) To support the primary access roads, a comprehensive signage program directing the traveller to various areas and attractions should be undertaken.
- iii) Tourists tend to be influenced by the apparent prosperity or dereliction of an area. Hence, along the primary access roads and even along the secondary highway system, efforts should be made to remove, camouflage or otherwise reduce the detrimental impact of man-made unsightliness and increase the aesthetics or visual appearance whenever possible.
- iv) In conjunction with the efforts to increase the aesthetics of the road environment, a program should be undertaken to identify and describe natural, historical, cultural and other man-made attractions or phenomena. Where possible, these attractions and phenomena should be packaged into scenic drives or ecotours.

- v) The availability of automotive, food and other services required by the tourist for their safety and comfort should be co-ordinated with the demand patterns of the travelling public so that the required services are available at reasonable intervals along the Zone's primary and secondary highways during principle travelling hours.
- vi) The Circle Route Tour passing through the Zone should be supported and encouraged. Because of its extension into other Tourism Development Zones, recommendations altering major aspects of the Circle Route Tour should await the completion of tourism development strategies for those zones.

Railways

- vii) Alternative modes of public transportation such as rail and air should be promoted to reduce the industry's vulnerability to future energy shortages. It is, therefore, recommended that a serious effort be made to investigate the feasibility of establishing a sports train travelling from Metro-Toronto to Collingwood and to investigate the services on a trial basis. Established under the auspices of VIA Rail, the sports train could carry, not only week-end and day-use visitors to the Tourism Development Areas, but could also serve as a community train for second home owners, and for individuals intending to explore the zone by bicycle, hiking trails or cross-country ski-trails. The train would therefore operate during 12 months of the year and serve as a major alternative to automobile travel.

If successful, the service could be expanded along the Canadian Pacific/Canadian National Systems to the Midland-Penetanguishene Tourism Destination Area and

along the Canadian National System to the Muskoka Lakes with intervening stops at major tourism and recreation attractions or resort areas.

Waterways

- viii) The operating hours of locks, marine railways and other services and facilities along the Trent-Severn waterway should be so regulated during the peak season that they match the requirements of the boats using the waterway.
- ix) Efforts to improve the provision of emergency services to boaters and effective means to regulate and control boat use throughout the major water areas of the Zone should be investigated and initiated.

Airports

- x) In the long-term, consideration should be given to the upgrading of existing regional airport facilities to accommodate the demands and tourism traffic generated by the Blue Mountain Four-Season Tourism Destination Area.

8.6.3 Marketing and Markets

- a) Of primary importance is the creation of an image or identity for the Zone and its component Tourism Development Areas; a distinctly different image that is recognized by existing users, potential visitors and residents and that sets the Zone apart from other zones. This identity and market awareness is fostered through both the scale, type and theme of tourism and recreation facilities, attractions and services provided and the characteristics and emphasis of

the marketing program. Co-operation from all relevant agencies, organizations, governments and operators is required to achieve the desired market awareness.

- b) The tourism industry of Tourism Destination Areas should pool its resources and develop an integrated marketing program extolling their distinctive facilities, attractions and events to increase its chances of being heard in the market place.
- c) Each tourism area should be developed and promoted in a manner that will add to the overall market strength of the Collingwood-Midland-Orillia Zone.
- d) The capability of unique attractions and events to act as major market generators (for example, the "Canada's Wonderland" for the southern part of the Zone) should be taken advantage of and promotional packages describing these events together with the area's support facilities should be created.
- e) The benefits derived from sophisticated, well-directed and well-supported marketing programs should be brought to the attention of private and public sector authorities.
- f) Ontario residents should be encouraged to invest in second-home vacation properties in strategic locations, thereby providing a built-in market for a variety of destination attractions.

- g) An on-going communication system to stimulate all travellers to take advantage of the tourism and recreation opportunities in the Zone should be developed. Information centres should be established to distribute requested information and to create further interest in the attractions and events available throughout the Zone. Where appropriate, information centres should also act as reservation centres.
- h) Both the public and private sector must recognize and strive to fulfill the need for innovative forms of tourism attractions and marketing programs. Especially, the private sector orientation must change from the marketing of accommodations to the marketing of a cluster of diverse attractions, events, programs and services.
- i) As tourism markets become increasingly diverse and competitive as tourists become more sophisticated and demanding in the quality and type of services and facilities provided, and as the cost of operating accommodation, travel services and resort facilities increase substantially, it becomes vital that a comprehensive research program be in place to provide the tourism industry with the data necessary to keep its plant, services and programs in tune with the demands of the market place. The on-going research program should collect and analyze data on such diverse topics as:
 - profiles, activity patterns and spending habits of visitors attending different types of attractions, events and outdoor recreation activities or facilities;
 - the development of a comprehensive grading system of accommodation establishments;
 - the role and importance of food, beverage and entertainment facilities in attracting and retaining tourists;

- the special requirements of distinct segments of the population such as senior citizens;
 - visitor reaction to different, innovative forms of accommodation;
 - the contribution of the tourism industry to the local and regional economies; or
 - the means to encourage the upgrading of community appearances in order to develop and maintain their physical attractions for tourism.
- j) Currently cottages, condominium or other forms of second-home ownership provide the most used type of accommodation and forms a large part of the demand for recreation and day-use facilities. It is estimated that the market will be able to support up to 3,000 new cottages or some other form of recreational second homes by 1984, and between 10,000 and 15,000 new units by the end of the 20-year planning period. Careful consideration should, therefore, be given to the provision of additional opportunities for second-home ownership.
- k) Time-shared markets are just beginning to be developed in Canada. New accommodation in the industry should be designed and managed to build in maximum flexibility to take advantage of internal time-sharing schemes.

8.6.4 Private and Public Sector Roles and Responsibilities

- a) Major development proposals can only be undertaken and realized by joint public and private sector involvement through innovative vehicles such as tourism development corporations, tourism development boards, developer agreements, and municipally-led development proposals.

- b) All major tourist developments should produce master developments plans that can be included and recognized in official plan and zoning by-law documents.
- c) To ensure a co-ordinated, systematic growth of the tourism industry of the Zone, both the public and private sectors have to assume their respective roles and responsibilities as defined by the development strategies or concepts and match their level of response in any one instance to the specific requirements of the development proposed.
- d) The advantages of a tourism development corporation and/or a tourism municipality designation for the Four-Season Tourism Destination Area should be considered to assist in priority establishment, phasing, development and management of the tourism plant of the Area.
- e) Development recommendations are based upon the assumption that every effort will be made by the private and public sector that the required utilities and services will be put in place. Accommodations and other tourism facilities are so dependent upon adequate servicing systems that to contemplate their establishment prior to the installation of the required services would be an exercise in futility.
- f) The viability of the Tourism Development Strategy is influenced strongly by the resource management and use activities of land use management agencies. A strong effort should therefore be made to encourage the acceptance of the tourism development strategy on an interdepartmental basis so that relevant capital works programs - such as road design and construction - can assist in the establishment of the required tourism infrastructure.
- g) Where tourism is an important part of the area's economy, the tourism perspective should be presented in a formal manner to commissions, authorities, planning boards and

local councils wherever policies, programs or activities are contemplated that may have a direct bearing upon the character and viability of the existing plant or future potentials of the tourism industry. This presentation should be made by an organization representing all aspects of the tourism industry of the Collingwood-Midland-Orillia Tourism Zone.

- h) The efforts of different segments of the public sector, and of different segments of the private sector should be integrated and co-ordinated to the degree required to implement development proposals.
- i) Tourism requires leadership and commitment from federal, provincial, county, township and municipal governments.
- j) The public sector should provide leadership in the areas of research, information distribution, training/education programs marketing and promotion and the provision of technical assistance.
- k) The private sector must face up to the realities of the resource and the competitiveness of the market situation, and the quality of the product required to match the competition. Hence, it must recognize that tourism ventures must be based upon sound business reasons rather than on the desire to have and maintain a certain "lifestyle" as a tourist operator.
- l) The public sector should continue to provide a framework for the planning and development of the Zone's tourism industry.

